# The Evaluation of Leadership Coaching

# Through a Lens of Ambidexterity

Thesis submitted in accordance with the requirements of the University of Chester for the degree of Doctor of Professional Studies by Mark Jamieson

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# Declaration

The material being presented for examination is my own work and has not been submitted for an award of this or another HEI except in minor particulars which are explicitly noted in the body of the thesis. Where research pertaining to the thesis was undertaken collaboratively, the nature and extent of my individual contribution has been made explicit.

# Abstract

**The Evaluation of Leadership Coaching Through a Lens of Ambidexterity**

**Mark Jamieson**

Leadership coaching has grown to become a significant intervention to respond to the management needs of an increasingly complex organisational environment. The substantial investment in leadership coaching corresponds with current accountability trends, raising the profile of evaluation; however, evidence shows that organisations treat evaluation in this context as being of low strategic value, characterised as limited and problematic, both operationally and strategically. Specifically, whereas evaluation has primarily focused on current organisational imperatives and financial targets, there is also evidence of the increasing emphasis on a new set of leadership behaviours to achieve competitiveness through adaptive capacities characterised by complex decision-making which balances short term outcomes in known circumstances with longer term capacity building in unknown contexts.

In response, this study adopts ambidexterity (the adaptive capacity to balance short-term-known and long-term-unknown demands) as a conceptual lens to examine the evaluation of leadership coaching and used in depth semi-structured interviews with 12 senior practitioners engaged in this area. The study found multiple incongruences between espoused strategic priorities and evaluation practice in-use, and identified apparent moderators that influence evaluation practice in-use. As such, an exploration of moderators contributed fresh insights into barriers and enablers, including six new dimensions for evaluation problematics, and seven promising movements with implications for practice. More generally, this study also asserts that the lens of ambidexterity presents new opportunities for an expansive exploration of evaluation in terms of a wider strategic contribution and, accordingly, suggests the dimensions of an ambidextrous framework, simultaneously pursuing a workable system that is also strategically helpful.

## Summary of doctoral elements table

| Stage | Critical insights and developments |
| --- | --- |
| Level 7 | Module IS7508 Personal and Professional Review Portfolio.<br><br>This portfolio combined a reflective narrative of personal key moments, and a meta-narrative for key external forces that have influenced and shaped my current position, establishing a context for research. This provided an agenda for preliminary scoping of a framework to identify and investigate practice issues, and locate precise research questions of personal and industry relevance. At this early stage, evaluation focused more generally on talent management and RoI, with three headlines: the war for talent, generational shifts in the workplace and talent development in uncertain times. Critical insights for future research approaches emerged, bridging the gap between scholarly and practitioner perspectives, along with the possible dimensions for the development of a conceptual framework. |

| | |
|---|---|
| Practitioner Enquiry | Module IS8001<br><br>Title: Strategic investment or costly obligation: how senior management perceive evaluation of executive coaching.<br><br>This study developed the review of literature that supported the previous section, narrowing the research focus to evaluation of executive coaching impact and the attitude of senior management in complex operating environments. In doing so, it reclassified evaluation problematics into three key areas: contingencies, intangibles and strategic alignment. It continued to develop the multi-dimensional research approach, spanning scholarly, practitioner and organisational agendas, refining the practice issue in terms of the relationship between coaching investments, external contingencies and evaluation. From this study, the role of decision making between conflicting outcomes with limited resources emerged, and the research focus began to shift towards leadership outcomes and coaching dimensions in the context of investment (as opposed to cost). |

| | |
|---|---|
| Minor Project | Module IS8002<br><br>Title: The Role of Evaluation in Strategically Aligned Human Resource Management: A strategy for uncertain times?<br><br>This study was written for consideration for publication in a ‘3’ journal. It continued to develop the focus for research from the previous studies; however, due to the nature of the journal, it adopted an HRM perspective, exploring the criticism from scholars that evaluation continued to remain undeveloped due to the ability of HR (as the evaluation stakeholder) to strategically evolve. Despite a one dimensional perspective, this paper produced valuable insights for the major project, specifically highlighting the organisational disconnect between operational and strategic approaches, which would form one of the key themes for the thesis. |

| | |
|---|---|
| Major Project (thesis) | Module IS8003<br><br>Title: Evaluation of Leadership Coaching Through a Lens of Ambidexterity<br><br>The three previous studies have all contributed to this thesis, specifically through the development of a conceptual framework for research, the focus on evaluation problematics and influencers of evaluation practice. A clear focus for this study has emerged from the gaps uncovered in research, knowledge and practice, encapsulated by the dynamic strategies of organisations to be adaptive, facilitated through leadership coaching, and the failure of evaluation to simultaneously evolve. It was thematic throughout the earlier work that a practitioner perspective for research would expand the scope of examination, and ambidexterity illuminated the subject and opened up strategic opportunities for exploration. The unique insights afforded from a practitioner researcher adopting an organisational perspective in a scholarly fashion, produced a number of significant implications for practice and the development of my own leadership coaching consultancy. |

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# Chapter 1 - Introduction

The path of my professional career has taken me from organisational leadership development stakeholder to practicing leadership coach. In the former role, evaluation of the organisation's leadership coaching investments was limited to self-reporting reaction, or an assumed value contribution to overall financial performance. At the time, a lack of formal measurement of impact was not considered problematic, despite the implication that its absence downgraded the strategic value of the process, and reduced collaborative opportunities for effective and relevant programme design. On reflection, the organisation's disinterest in evaluation raised questions about its commitment to coaching as a strategic intervention, or, whether it perceived coaching as a fad or a marketing device to recruit and retain talent. Latterly, as part of the research undertaken to set up my own coaching consultancy, I collaborated in the EMCC Research Policy and Practice Provocations Report (Wall et al 2017) focused on coaching perspectives of evaluation. The data emerging from this research revealed a lack of commitment from coach practitioners to evaluation similar to that experienced organisationally, limited at both data collection and data usage stages.

The EMCC report raised a number of key considerations, all of which are explored in this study, including: the potential role of competency frameworks; the implications for evaluation of its reliance on professional judgement; a more sophisticated appreciation of evaluation complexity; tools that enrich practice; and the potential contribution from coaches to organisational evaluation practice. Accordingly, a collaborative research approach has inspired this study, where it is claimed most scholarly research into evaluation has been narrowly focused, or inaccessibly complex to practitioners (Beer 2015; Wall et al 2016). At the same time, coach practitioner research has generally been tendentious and self-serving (Kaufman 2015). This study takes a different approach, with a practicing leadership coach researching the subject from an organisational perspective in a scholarly context, bridging the gap between theory and practice. It is intended to not only refresh understanding of evaluation and explore strategic possibilities for the organisation, but simultaneously develop my own offering by re-examining the relationship between the coach and the client.

This chapter provides an overview of research, the practice issue, aims and objectives, and a rationale for methodology. Firstly, it presents a detailed examination of the current landscape for evaluation and the problems, persistent and emerging, faced by practitioners. Having established the practice issue, it provides a context for the focus of this study, to explore leadership coaching evaluation, and the claim it is limited and problematical, specifically where emphasis continues to be focused on short term financial targets (Grant 2012; CIPD 2015). In doing so, it recognises the need to narrow the gap between theory and implementation, responding to the call from scholars to research within a realistic environment (Gubbins & Rousseau 2015; Beer 2015; Wall et al 2016). Therefore, this section introduces a distinctive research perspective, asserted to be representative of a dynamic workplace, reflecting emerging leadership outcomes and coaching dimensions, characterised by balanced decision-making between short term business imperatives and long term vision for future competitive relevance. The methodology and methods for this approach are then outlined and rationalised in terms of the nature of research. Finally, the unique contribution to evaluation theory and practice is highlighted, providing a platform for this thesis, from which to investigate current knowledge, new insights and implications for evaluation research and development.

## The practice issue

Leadership coaching has become a significant intervention to respond to the current management needs of an increasingly complex organisational environment (CIPD 2015; 2017). The substantial investment in leadership coaching coincides with intensifying accountability trends as part of the emerging context, elevating evaluation to organisational imperative (Phillips et al 2012). However, despite increased accountability and recognition of the strategic value of developing new leadership behaviours, evidence finds evaluation of leadership coaching limited and problematic (McGovern et al 2001; Parry & Tyson 2007; CIPD 2013; 2014; 2015). Specifically, whereas evaluation has primarily focused on current short term management targets for performance, change, talent, career and succession, there is now evidence of the increasing emphasis on managerial decision-making, balancing short term imperatives with strategic long term capacity building, as part of the adaptive strategy for which organisations currently strive (Hatum 2010). At the same time, it is claimed evaluation research is unsophisticated, overly reliant on case studies and narrow evidence-based approaches, not advanced enough to conduct meaningful quasi-experimental or randomised controlled studies, in-practice or between-practices (Grant et al 2010; HakhemZadah & Baba 2016; Morrell & Learnmouth 2015). Within this school of thought, the wide variations between tangibles and intangibles in outcome metrics, ranging from short term financial performance targets to time indeterminate interpersonal leadership behaviours, need to be addressed (Grant et al 2010; Bono et al 2011). The diversity of outcomes to be evaluated, often characterised in the literature as the idiosyncratic nature of leadership coaching (Ely et al 2010), has been identified as a persistent problem for evaluation practitioners and, in part, an explanation for the focus on financially measurable short term targets. To respond to limitations in this field, scholars have challenged researchers to move beyond a scientific paradigm to work within an adaptive environment representative of current leadership challenges, to narrow the gap between theory and implementation (Gubbins & Rousseau 2015; HakhemZadeh & Baba 2016; Beer, 2015; Bartunek & Rynes 2014; Wall et al 2016).

Within the current dynamic environment, leadership faces a new set of challenges: for change, learning and risk taking (Delmotte et al 2012; Beltrán-Martín & Roca-Puig, 2013; Beltrán-Martín, Roca-Puig, Escrig-Tena, & Bou-Llusar, 2008). These challenges reflect the emerging context and new organisational requirement for agility: the ability to purposefully adapt behaviours and systems in response to external contingencies, move simultaneously in multiple directions and deliver a scalable workforce capability (Erickson& Dyer 2005). However, research reveals a significant number of organisations do not believe they have the quality of leadership to deliver the agile environment necessary for either success or sustainability (ICF 2016). Since the global financial crisis in 2008, there has been an increasing amount of research focused on organisational leadership, providing evidence of two key trends that encapsulate the problem: leadership is considered the highly significant resource relied upon to deliver competitive advantage, and today's leaders are not equipped to deal with the challenges posed by the rapidly and dramatically changing context within which organisations now operate (CIPD 2017). Consequently, leadership development, as an organisational strategy, has grown exponentially over the last decade, as organisations strive to keep pace with constantly emerging leadership performance outcomes resulting from external influences (political, economic, global, demographic and technological) and internal characteristics (values, primary outcomes and cultural dimensions).

As part of this strategy, organisations are reportedly shifting emphasis away from traditional, outdated leadership targets, now superseded by a new set of outcomes and competencies shaped by emergent (external and internal) variables, that focus on long term intangible behaviours, broadly characterised as: purpose over profit; strategy based on capabilities, culture and values, as opposed to short term opportunism; management philosophy and up to date leadership trends; and the tension between financial risk (for short term outcomes) and cultural risk (for long term goals) (Hatum 2010; Kaufman 2015). It is accepted this is an oversimplification of a complex practice issue; however these characteristics provide insights into the current direction of leadership development thinking: to become adaptive, characterised by a dynamic capability focused on non-traditional, flexible learning skills and attitudes, including openness to change, behavioural and cognitive development, creativity and autonomy. A further trend shaping leadership development strategy is the belief high performance is embedded in the people resource, dependent on superior methods of leadership to motivate talent (Hatum 2010). Consequently, the new dimensions of leadership learning capability are unorthodox from previous learning and development, focusing on emotional and behavioural science, beliefs and attitudes, aligning competencies with emergent workforce needs and a re-examination of the relationship between current leadership and the next generation of management (Beer 2015). Having identified a new set of outcomes and critical leadership skills, organisations, in seeking to ensure they employ the most effective methods, have turned to leadership coaching, which has become the dominant development methodology to deliver current leadership goals.

This has led to a substantial increase in investment by organisations in leadership coaching. In 2004 annual spending on leadership coaching, in the United States alone, was placed at $1billion (Sherman & Freas 2004); in 2015, estimated global revenue for coaching had risen to $2.356 billion, a 19% increase since 2011 (International Coaching Federation 2016), providing evidence of the growing consensus over the positive relationship between organisational leadership, a dynamic workforce and performance outcomes. However, research in this field is characterised by anomalies and budgeting trends contradict strategy providing further evidence of the short term view taken by organisations, and the tension over decision-making for the allocation of resources. An ICF survey in 2014 illustrated the strategic ambiguity in this area, reporting that, although senior management generally confirmed coaching had a significant impact on performance, when looking at coaching budgets for the following year more than half (56%) of respondents indicated they would only retain the current scope of coaching and their budgets would not be increased. Despite these anomalies, the headline trend remains: organisations continue to invest significant sums in this form of development programme.

At the same time, as a consequence of the evolving context (global, demographic and technological), intensifying accountability is now a global trend (Sparrow & Makram 2015). External economic forces are reported as a key driver for a new emphasis on organisations to seek better returns on workforce investments, increasing the pressure to connect human resource management (HRM) strategies with financial performance, localised through competitor and budgetary pressures, elevating evaluation to organisational imperative (Phillips 2011). Therefore, increasing accountability pressures combined with the reliance on leadership, as the key resource, to deliver organisational strategy, have challenged senior managers to shift their thinking on human resource development (HRD) investments. This change in mindset has seen the evolution of strategically focused human resource management (SHRM), with the capability to justify its existence by capturing the value added to wider organisational goals where, historically, it had been accepted that this function could not be measured, at least in terms of financial contribution, raising expectations for evaluation in this context (Yapp 2009; Beer 2015).

At a time when evaluation is in the spotlight, leadership coaching continues to be allocated substantial investment funds and is, therefore, the focus of much attention. Historically, the evaluation of impact of leadership coaching programmes has been the subject of considerable scholarly examination. However, despite the prolific contribution from authors over recent years, evidence finds evaluation persists in being limited or problematic, particularly when assessed against the delivery of practice principles organisations can, or are motivated to implement. A survey by the Chartered Institute of Personnel and Development (CIPD Annual Survey: Learning and Development 2015) highlights the current situation, reporting evidence of the increasing reliance on leadership coaching and the general consensus that evaluation of impact is a necessary and desired objective. At the same time, the research finds many organisations report they struggle to evaluate the impact of their investment in coaching programmes on outcomes and goals. In summarising their findings, they concluded:

One in seven organisations do not evaluate their coaching initiatives
Over a third of organisations limit their evaluation to the satisfaction levels of those taking part
Only one in five organisations assess the transfer of learning into the workplace
Only a small minority of organisations evaluate the wider impact on the business or society.

These findings not only reflect the problematic nature of evaluation, but exemplify the gap between scholarly research and practice, challenging the assumption that general acceptance of a principle is sufficient motive for practical implementation. The implication is that, in practice, the majority of organisations are ambivalent about evaluation and its claim for priority status despite proof of the positive relationship between leadership coaching and wider strategic goals, and their willingness to invest substantially in this area (Beer 2015; Wall et al 2017).

Placing these headlines in the context of practice, provides evidence of the current confusion around evaluation, and its short term focus, revealing useful insights into practitioner attitudes which help explain implementation strategies. For instance, despite the level of investment and academic advocacy for evaluation, the vast majority of organisations have no system in place to measure either impact or value of leadership coaching investments (Parry & Tyson 2007; CIPD 2015). Where organisations attempt evaluation, metrics have not simultaneously evolved with the emerging context, and many continue to measure through traditional HR criteria, predominately focused on short term outcomes such as cost and financial accountability (Yapp 2009). The CIPD (2008; 2013; 2014; 2015) thematically report that organisations claim their leadership coaching is aligned to business strategy; but, at the same time, most fail to evaluate the impact of these programmes on strategic outcomes and goals (CIPD 2015). Methodology in current practice similarly provides key insights into the pace of progress made by research in this field. In 2013 the CIPD reported more than half of respondents used a variation of Kirkpatrick's four levels model for evaluation, and the majority measured no further than the initial, reaction level. Although Kirkpatrick's model (assessment at reaction, learning, behaviour and outcome levels) was formulated in 1959, it evidently continues to form the framework for much investigation and design (notably Phillips' additional level: RoI, introduced in 1994), and is still widely used despite claims it is designed around outdated external and internal contingencies, and the significant bifurcation in the literature over its currency and relevance (Wall et al 2017; Kaufman 2015; Beer 2015; Guerci, Bartezzaghi & Solari 2010; ASTD 2009).

The criticism that thinking is outdated (Kaufman 2012; Beer 2015) is explored by examining how existing knowledge is developed by the emerging context, specifically whether an unprecedented period of volatility has exacerbated evaluation problematics, or whether the strategic response of organisations presents opportunities for research and development. Collectively, literature continues to categorise persistent problems with reference to three historic issues: strategic alignment (diverse outcomes for multiple stakeholders), contingencies (external and internal contextualisation) and intangibles (the idiosyncratic nature of leadership coaching). Simultaneously, the current organisational landscape, over the last ten years, has become increasingly complex, defined not only by emerging outcomes and competencies for leaders, but also by numerous interpretations of value, reflecting the distinct organisational cultures and multiple outcomes of diverse stakeholders and different activities. Where research has developed to recognise the emerging context is in the distinction it makes between leadership coaching and other forms of executive development. Scholars describe leadership coaching as a more complex and dynamic one-to-one relationship, with proximal and distal outcomes unique to each individual (Ely et al 2010), and assert it comes with distinct set of evaluation challenges, made complex and shaped by the pursuit of predominantly intangible outcomes over indeterminate timelines.

Authors assert that leadership's current challenge is to make balanced and complex decisions, with limited resources, between financial risk for immediate business imperatives, and cultural risk for innovative strategies with no immediate economic legitimacy (O'Reilly & Tushman 2004; 2013), conceptualised by Duncan (1976) as ambidexterity. In this context, the challenge for evaluation is that it is primarily focused on pressing leadership requirements and an operational set of management outcomes. At the same time, evidence suggests the fundamental strategic outcome organisations strive for is to be adaptive, increasing emphasis on leadership to make complex decisions over the allocation and deployment of limited resources, during all economic cycles, balancing short term imperatives with strategic long term capacity building (Passmore, O'Shea & Horney 2010; O'Reilly & Tushman 2013). Although many scholars have studied the adaptive environment as a dominant strategy for uncertain times, it has not simultaneously evolved in terms of evaluation. Therefore, evaluation strategy is liable to contradict overarching organisational strategy by being focused primarily on the short term: in response to the pressing nature of current organisational priorities, reflecting the tension between the idiosyncratic and complex nature of leadership coaching (difficult to measure intangible outcomes) and the drive for visible accountability (measurable management outcomes); this, despite parallel research highlighting the rapid evolution of the world of work, and the extraordinary opportunity to encourage long term, sustainable growth through investment in HRM practice (CIPD 2015).

### The research gap, research question, aim and objectives

Leadership coaching is no longer a new phenomenon and for some time has been the significant intervention, increasingly relied upon by the organisation, to support management. However, despite its position as an established development methodology and the exponential growth in leadership coaching to meet demand, there continues to be insufficient understanding of evaluation and a general lack of confidence from practitioners. The claim in the literature that an absence of empirical research has left the field vulnerable to scepticism, speculation and subjective opinion (Wall et al 2017; Levinson 2009), has implicated research limitations in the tentative approaches to exploring wider strategic opportunities for evaluation, or setting coaching strategies and budgets. Accordingly, researchers have been challenged to produce new insights into the impact of leadership coaching. At the same time, new outcomes and competencies for leaders are emerging, providing a different context for evaluation, potentially widening the gap between research and practice, with evidence that evaluation is limited to traditional short term management outcomes that do not reflect current complex organisational needs. Having reviewed literature, this study addressed this gap, comprising three broad areas that have been found to hinder progress: research, knowledge and practice.

In terms of research, scholars are critical that investigative approaches remain unsatisfactory (Collings et al 2011; Kaufman 2012; Beer, Boselie & Brewster 2015; Wall et al 2016), suggesting three main issues. Firstly, multiple definitions and perspectives (including diverse outcomes of different stakeholders and the internal characteristics of the organisation), which are liable to skew findings unless fully aligned to personal, professional and organisational goals. Secondly, despite claiming a broad lens, researchers have been charged with adopting one of three views: narrow focus, unilateralist approach or managerialist view, rarely integrated or placed into a wider perspective. Furthermore, knowledge has not been enriched by the proliferation of tendentious executive coach practitioner research, significantly outnumbering rigorous empirical investigations that act as marketing tools for the benefits of coaching. Finally, as evinced by the findings from the CIPD (2015), organisations openly confess to being disengaged with evaluation, and a lack of interest from practitioners in scholarly theory implies that either research is considered out of touch with the needs of the organisation, or senior management place low strategic value on evaluation, despite claims to the contrary. As a result, scholars have challenged researchers to move beyond scientific analysis (Collings et al 2011; Kaufman 2015; Morrell & Learnmouth 2015; Wright et al 2016; Wall et al 2016) to study in a practice environment, using an effective lens for research, representative of current leadership expectations and coaching dimensions, to narrow the gap between theory and implementation, developing potential opportunities for evaluation to fulfil a strategically expansive role.

Authors often attribute gaps in knowledge to the idiosyncratic nature of leadership coaching, distinguishing it from other coaching and development programmes by its focus on the unique characteristics and exclusive relationship of the individual and the organisation (Ely et al 2011; Hernez-Broome & Boyce 2011). Furthermore, the evolving organisational context adds another dimension, as leadership coaching pursues a new set of targets over indeterminate timelines, potentially widening the knowledge gap. In other words, as organisations have simultaneously evolved with external complexities, evaluation knowledge has lagged behind and remains focused on persistent problems and limitations in an historic context. Practitioners have been challenged by outdated knowledge that produces an abundance of contradictory perspectives over the relevance, metrics and methodology of evaluation, manifest in practical terms by the gap between what organisations value and what is evaluated. At the heart of this knowledge deficiency, there is very little understanding of evaluation moderators to facilitate valuable new insights into emerging problematics and strategically promising movements, specifically in redefining and making relevant historic barriers and their impact in the current context.

The practice gap is identified as the lack of association between strategic and operational mindsets, characterised by the evident disconnect between emerging leadership outcomes and coaching dimensions, and evaluation targets and processes (Parry & Tyson 2007; Yapp 2009; Grant 2012; CIPD 2014). In practical terms, organisations have responded to current challenges to be strategically adaptive, through various mechanisms and systems that balance short-term-known and long-term-unknown demands. However, the intentionality to deliver strategic balance, recognising the contribution of intangible outcomes with fragile financial legitimacy, is not extended to evaluation. Furthermore, this lack of simultaneous development means evaluation systems remain operationally focused on traditional measurable HR criteria, or inextricably linked to performance management processes, specifically reward and recognition, compromised by financial self-interest. Therefore, organisations are generally failing to connect existing emergent systems and thinking to be strategically adaptive to evaluation, thereby contradicting the wider strategy by focusing on outcomes that are not strategically aligned, and overlooking promising movements, already in place, for research and development of an integrated evaluation design.

To address these gaps, the research question for this study focuses on the evaluation of leadership coaching through a lens of ambidexterity. A significant objective for this research is to contextualise evaluation practice, recreating the leadership challenges of the current environment, by using a lens of ambidexterity (the adaptive capacity to balance exploitative and explorative outcomes) as a distinct approach. Facilitated by this approach, it aims to interrogate existing knowledge to produce fresh insights, investigating three broad research questions focusing on: the experiences of those making judgements on leadership coaching evaluation in an ambidextrous context; problems and limitations of leadership coaching evaluation practice; and ambidextrous dimensions of evaluation.

## Outline methodology

The philosophical assumptions that underpin this research's methodology and methods reflect the nature of reality in terms of the emerging context, characterised by ambidexterity (Duncan 1976; O'Reilly & Tushman 2004); the research relationship; the values of the research; the language of the research; and the procedures. These have shaped the inductive methodological interpretivist approach, its exploratory nature (Wilson 2010) and the methods chosen to obtain qualitative data. The challenge from scholars to researchers, in a field that is now beset with intangible behaviours and outcomes, to conduct studies that go beyond analytical science in pursuit of practice principles (Gubbins & Rousseau 2015; Morrell & Learnmouth 2015; Wall et al 2016), has influenced the selection of a lens of ambidexterity through which to examine this subject, as representative of the current complex organisational environment. From the main themes in literature, three broad research questions emerged around experiences, problematics and ambidextrous frameworks. In addition to these questions, a conceptual framework for ambidextrous balance has been derived from literature, connecting emerging leadership outcomes to coaching dimensions and implications for evaluation in the current context. This was used as a practical lens for ambidexterity at data collection and analysis stages of research.

An interpretivist epistemology has been adopted to produce insights and realities reflecting approaches, attitudes and moderators of evaluation, and as a research platform to retrieve data emerging from an ambidextrous perspective focusing on the experiences of participants. A subjective ontological stance meant research was positioned to explore multiple interpretations and perceptions from participants. Therefore, it is claimed this research methodology supports the methods employed to engage with participants in an interactive style, to describe and reveal experiences through unique individual perspectives for discussion and in-depth development, facilitated by a research framework to uncover themes, competing meanings and priorities. As such, data was collected from a purposive sample via a cross-sectional process including semi-structured interviews across organisational sectors (private, public and third). It was then analysed through a system of coding, predominately categorised by experienced informed subjectivity, to reveal themes in relation to the three broad research questions. The research sample was invited to participate due to their positions as evaluation stakeholders. This was sourced from the researcher's professional network and developed through data saturation. Having collected data, analysis was processed over three key stages: familiarisation; interpretation; and conclusions (including conceptualisation). Audio recordings and transcripts of interviews were examined to produce broad descriptive categories for systematic coding, to classify preliminary and secondary codes to produce basic and organising themes for analysis. Data was then conceptualised by connecting themes across the research's conceptual framework to draw conclusions, linking findings to extant knowledge for fresh insights. The research was tested for reliability, validity and generalisability, using techniques that accept its subjective nature. Finally, the research was conducted under the guiding principles laid down by the Economic and Social Research Council (2012) framework for research ethics.

## Proposed contribution to theory and practice

This study set out to make key contributions in areas of research, knowledge and practice. In terms of research, it provided a strategic lens, placing evaluation in a wider context, encompassing the day-to-day challenges faced by leaders and the environment within which they are called upon to make decisions. From this perspective the experiences of participating practitioners revealed a contradictory environment for evaluation characterised by three anomalies: evaluation contradicted organisational strategy; metrics conflicted with value outcomes; and evaluation was regarded as having low strategic value. A strategic lens opened up opportunities for research to explore the subject from a practitioner perspective, contributing a deeper understanding of the problematic nature of evaluation through an investigation of anomalies in the data and those factors that influence practice. Placing evaluation in the emerging context refocused the examination of problematics to explore organisational strategies and their implications for practice, to contribute to knowledge, specifically in terms of intangibles and strategic alignment barriers. It was demonstrated that existing frameworks provided structure and definition to emergent leadership outcomes, potentially isolating their contribution to a primary goal, with promising implications for practice. Further exploration of these strategies refined understanding of influencers and produced defined moderators. Moderators contributed new insights into practice, placing barriers and evaluation data in the context of the unique processes and metrics of the organisation, to facilitate an exploration of the strategic potential of evaluation data, simultaneously pursuing a workable system that is also strategically helpful.

# Chapter 2 - Professional & Literature Review

## Introduction

Building on the broadly defined practice issue in the last chapter, this section provides an exploration of what has been written about this subject, summarising, comparing and critically analysing (Eriksson & Kovalainen, 2008) scholarly and practitioner outputs. Due to limited knowledge and gaps in research, this area is rich with anomalies. Therefore, as well as presenting the key themes and issues in literature, this review also seeks to set out the contrasting views of different schools of thought to explore conflicting perspectives. Inclusion of historic literature is justified as a further reflection of the lack of progress in this area and the continued reliance of practitioners on dated models and theory that also characterise the practice issue. This chapter aims to provide a balanced review of the literature and is divided into three sections. The first expands the broad premise of the practice issue, examining the problematic nature of evaluation, while the next section explores the emerging context and implications for coaching and evaluation. Finally, the third section looks at the influence of ambidextrous perspectives on evaluation practice.

Whereas a systematic literature review had been used in previous research and formed the basis for some seminal writings relevant to this study, this methodology was rejected in favour of a narrative review. In relation to the research question and focus, a systematic methodology was felt to be too narrowly focused and restrictive when considering the interpretivist epistemology and exploratory nature of this study. Therefore, a narrative review was adopted as an appropriate approach that best served the research question, providing the necessary flexibility to expand the scope of the subject as it developed. Specifically, this methodology was considered apposite for two reasons: firstly, it recognised the limited literature available in this field and enabled a wider exploration through a less explicit criteria including executive coaching and multiple perspectives. Secondly, it expanded the range of literature to facilitate ambidexterity as a context for research. This methodology effectively provided a balanced funnel-shaped study (Stokes & Wall 2014), using a broad context to develop understanding and in-depth discussion of theories and issues, as well as identifying and developing the three broad research questions for this study. Due to the potentially expansive scope of literature resulting from a narrative review, some of the procedures associated with systematic review methodology were incorporated, specifically to identify and apply boundaries focused on the three key terms of the research question: evaluation; leadership coaching and an ambidextrous context.

### The problematic nature of leadership coaching evaluation practice

The business case for leadership coaching is encapsulated by the headline findings in a number of practice surveys in literature, specifically focused on global leadership trends (CIPD 2015; 2017; DDI & CIPD 2011; DDI 2018; ICF 2014): organisations with the highest quality of leadership outperform their competitors; the majority of organisations do not have confidence their leadership is equipped to tackle the challenges of an increasingly complex business environment; and the quality of leadership development programmes is the dominant determinant of leadership effectiveness. Having clearly identified the requirement to invest in leadership development, organisations must decide on the critical outcomes they seek and the most effective methods in the market. There is general agreement that the new criteria for leadership development is unfamiliar, including cognitive learning focused on experiential and emotional behavioural science (Hatum 2010), beliefs and attitudes (Noe & Colquitt 2002), aligned competencies with emergent workforce needs and dismantling traditional hierarchical structures to re-examine the relationship between current leadership and the next generation of management (Beer 2015). These practice sources also report leadership coaching was highly rated amongst organisations when choosing the most appropriate intervention to respond to the management needs of the current environment.

Growth in leadership coaching coincides with commercial pressures that have intensified the spotlight on organisations to seek better returns for expenditure on human resources (Passmore & Velez 2012), through strategic alignment and evaluation (CIPD 2014). Therefore, a combination of increased investment and the challenges of the emerging environment has elevated the status of evaluation to organisational imperative. The new emphasis on evaluation is reflected in the introduction of strategic elements to what has previously been perceived as an operational exercise. The influence of turbulent economic forces, refocused and localised through intensifying competitor and internal budgetary pressures, has subsequently increased the onus on organisational support functions to demonstrate their value in terms of financial contribution (Phillips 2011). A new form of accountability, both operational and strategic, has challenged organisations to reassess evaluation criteria, moving it beyond traditional budgetary metrics, shifting the focus away from cost towards return (Yapp 2009) and requiring an integrated analytical approach aligned to specific strategic goals (Phillips, Phillips & Edwards 2012).

As part of a reassessment of criteria, the CIPD (2007) highlighted evaluation and value as two distinct areas of challenge, characterised by the capacity to place unique definitions of value outcomes at the centre of an evaluation loop to achieve strategic alignment, facilitated by an appropriate and relevant set of measurement tools and metrics. The implication being, every organisation is different and the evaluation strategy will depend on the unique organisational context, rendering a one size fits all approach inappropriate. At the same time, there is a consensus that research into evaluation has failed to keep pace with the increasing complexity of the organisational landscape, and a lack of empirical studies, unilaterally or managerially focused, limits understanding of a complicated, layered subject with multiple interpretations, hindering its ongoing practical value (Wall et al 2016; Morrell & Learnmouth 2015). Consequently, future leadership coaching programmes, unsupported by relevant evaluation data, are vulnerable to being designed in an analytical vacuum (Levinson 2009), at a time when organisations are reliant on them as an instrument to pursue strategic goals.

At such a pivotal time, evidence that organisations are managing the challenge of evaluation in practice is not encouraging. A CIPD learning and development survey in 2015 highlights the current limitations of evaluation, reporting that although most UK organisations surveyed intended to assess the impact of their leadership and talent development investments, evaluation was largely confined to participant satisfaction (37% across organisational sectors). Furthermore, evaluation of change in knowledge and skills was reported at 22%, while evaluation of change in behaviours through assessment of transference of knowledge in the workplace was at 21%. At a broader level, the survey found only 7% attempt to evaluate the wider impact on the business or society, while 14% do not conduct any evaluation. Where evaluation data was retrieved it was found to be of limited use, predominately focused on informing future development programme designs and efficacy for leadership coaching. Finally, a more detailed investigation of the metrics currently used by organisations to quantify impact on goals sheds light on current organisational priorities, focused on short term targets, including sales volume, profit, performance on productivity figures and efficiency savings. This report provided a helpful insight into the state of evaluation, highlighting limitations of criteria that have not simultaneously developed with new organisational and leadership outcomes emerging from external complexity, precipitating a predominately one dimensional short term approach.

At a time when evaluation is primarily focused on short term outcomes, evidence reports organisations are placing growing emphasis on adaptive leadership to deliver a balanced strategy, shaped by a complex operating environment that includes long term goals. Influenced by the rapidly evolving technological and global context, which over recent years has characterised the organisational environment (Colakoglu et al 2006), the impact of unpredictable economic conditions (Capelli 2008), seismic shifts in demographics and changing attitudes to work (Wall & Knights 2013; Wall et al 2017), a new set of organisational outcomes for leadership has evolved and influenced current thinking in leadership development. The new challenges organisations face are characterised by Delmotte (2012): for change (ambiguity and volatility), for learning (complexity and flexibility) and for risk taking (uncertainty). These challenges have emerged from the impact of external variables and require adaptive leadership: to develop a capability for flexibility; and to reorient behaviours and procedures in line with internal and external contingencies (O'Reilly & Tushman 2013). Therefore, the role for leadership has evolved, with new competencies such as agility and adaptability the focus for coaching interventions, to enable leaders to deliver organisations that can adjust, react and learn more effectively, making ongoing switches in human resources, structure, systems and technology, as a way to gain competitive advantage (Passmore, O'Shea & Horney 2010). However, although organisations have successfully identified emerging leadership outcomes and connected them to leadership coaching as an effective development intervention, it is evident evaluation perspectives have not simultaneously evolved and continue to be problematic and out of step.

Some authors are making progress, recognising the emerging context and the collaborative contribution necessary from researchers and practitioners to develop understanding in this field. Sparrow and Makram (2015) set a new agenda for evaluation, asserting: clearly defined value and its assessment is the critical challenge, and research must play its part in delivering principles that are relevant and compelling to leadership, investigating increasingly complex contexts in an innovative and creative way, to enrich academic knowledge and produce practical methodologies. However, the majority of the literature is intent on closing an existing research gap, assumed to be static but potentially widening as a result of a vastly different context. Accordingly, within the purview of leadership coaching, contemporary literature reveals an attachment to historic persistent problems which continue to form the basis for academic research and practice methodology. In their simplest form, evaluation barriers are classified as time, budget and ability (ICF 2014). From a synthesis of the literature, these have been developed by scholars and reclassified as: contingencies (the impact of external forces); intangibles (the dimensions of emerging leadership outcomes and the idiosyncratic nature of coaching); and strategic alignment (diverse outcomes, multiple stakeholders and different activities).

Contingencies, characterised as the complexity resulting from meta trends and external contextualisation (Erikson & Dyer 2005), were redefined by the global financial crisis of 2008, which has since dominated contemporary strategic thinking (Schuler, Jackson & Tarique 2011). As part of this mindset, organisations strive to adapt rapidly to the changes imposed by external variables, allocating resources by prioritising and focusing on areas of highest business impact (Hatum 2010). In an uncertain environment it is claimed periods of crisis are normalised (Erikson & Dyer 2005) and this may in part, explain the organisation's preoccupation with assessing impact on short term imperatives. As a result, evaluation outcomes have become a moving target in response to rapidly developing external variables and internal organisational characteristics (Kaufman 2015), and, where primarily focused on short term imperatives, limited and out of touch with the wider strategic needs of the organisation. Intangible outcomes, precipitated by emerging leadership targets, reflect the idiosyncratic nature of coaching (Ely et al 2011). Cheese (2010) refers to a number of new intangible challenges for leaders, exploring unconventional and non-traditional aspects, including meaningful, strategically aligned understanding of core values, and a willingness to create a culture of learning, innovation and creativity.

Lewis and Heckman (2006), meanwhile, emphasise the responsibility of leaders to deliver refocused aspects of human resource management (HRM), through a new set of capabilities and softer skills, to engage the entire organisation. Historically, intangible outcomes have been considered problematic due to the emphasis placed on them to elicit meaningful comparisons with tangible targets for evaluation.

It is argued, the new diversity of leadership coaching outcomes have exacerbated intangibles as a problem area, and scholars have proposed a number of systems for evaluation inventories to reflect the unique intervention of the leadership coach (Peterson 1993; Orenstein 2006). However, inventories and customised surveys (Jones, Rafferty & Griffin 2006; Bass & Avolio 1994) have all been found to be limited by data collection methods. The wide range of leadership outcomes challenges evaluation stakeholders to assign values to each category, referred to in some of the literature as validated measures for evaluation. Within this thinking, goal attainment ranges from well-being and mental health (Levine, Kase & Vitale 2006; Passmore & Gibbes 2007; Lovibond & Lovibond 1995; Diener, Emmons, Larsen, & Griffin 1985; Nowack, 1990), to goal attainment scaling techniques (Fillery-Travis & Lane 2006; McGovern et al 2001; Spence 2007), specifically introducing what some authors insist is the ultimate evaluation indicator, return on investment. A number of authors and practitioners remain sceptical over RoI, as a complex calculation to arrive at percentages they believe lack credibility (Grant et al 2010; Levenson 2009; DeMeuse et al 2009), and limiting development, restricting the creativity of leadership coaches, skewing leaders' awareness of a broader range of positive benefits (Grant 2012; Levenson 2009). An alternative school of thought argues RoI is the ultimate level of evaluation for which organisations should strive, as a clear and tangible measurement of value added in monetary terms (Phillips & Phillips 2007, Phillips et al 2012; Lawrence & Whyte 2014; Kearns 2005a; 2005b). The increasing emphasis on intangible leadership strategies, combined with the complicated and multifaceted nature of the coaching intervention employed to deliver them, expand the scope and complexity of outcomes with no immediate financial legitimacy, as part of the evaluation process.

Traditionally, strategic alignment has challenged evaluation practice due to multiple definitions and conceptual ambiguity for what constitutes value (Phillips et al 2012; Parry & Tyson 2007; Lewis & Heckman 2006; Ashton & Morton 2005). Despite the importance placed on clear and connected strategic outcomes (Anderson & Anderson 2005; Phillips et al 2012; Watson 2013; Lewis & Heckman 2006; Collings & Mellahi 2009; CIPD 2015), the literature continues to categorise strategic alignment superficially across organisations where, in reality, its defining characteristics are unique to the individual organisation, dependant on a specific set of outcomes, insights into leadership and overarching organisational philosophies and values (Boxall 2012; Paauwe 2004; Sparrow et al 2014). The current environment intensifies the spotlight on strategic alignment, increasing the problematic impact on evaluation research and development, through the overarching goal to become adaptive. In an adaptive environment, strategic alignment gains another level of complexity, reflecting the balanced decision-making processes over the allocation of limited resources between short term and long term targets. Therefore, strategic alignment, previously hindered by diverse goals, multiple stakeholders and different activities of organisations (Watson 2013), is now a more complex problem for evaluation. Generational shifts, a continuously evolving context and resultant leadership expectations, since the global financial crisis, have shaped the dimensions of strategic alignment, moving leadership emphasis away from immediate short term imperatives to encompass longer term strategic thinking during all economic contingencies. Furthermore, the tripartite relationship between coach, coachee and sponsor, and opaque stakeholder definitions (Wall et al 2018), have added another layer of complexity to challenge practitioners.

The systems that strive to address strategic alignment are criticised by some authors as being overly optimistic in claiming to deliver long term practical impact, where evidence suggests formal methodologies have not kept pace with emerging leadership outcomes (Angrave et al 2016; Beer 2015; Kaufman 2015). HR analytics typify such systems, characterised by distinct operational and strategic perspectives in conflict, illustrating how, without access to strategic alignment, a must-have solution becomes a fad (Angrave et al 2016). The premise for this system is sound, and theory is grounded in a set of key requirements for 21st century HR professionals, reflecting strategic alignment and focused on optimising performance through talent (Boudreau & Jesuthasen 2011; Cascio & Boudreau 2011), including: strategic understanding (how people contribute to organisational success), meaningful evaluation rooted in context, identification of pivotal positions, and the production of data that assess how human capital input affects the performance of the organisation (evaluation). However, despite this clarity of purpose, there is typically little evidence that evaluation practitioners regard HR analytics as a practical tool. Angrave and colleagues (2016) suggest four reasons for this, characterising the problematic nature of evaluation; firstly the traditional scepticism of HR to evaluate people in strategic terms, questioning the claim HRM has evolved as a strategic function. Secondly, the competency of HR to ask questions that are strategically aligned and capable of eliciting the practical data organisations require. Thirdly, the silo mentality of organisations that reflects the challenges of internal context and blurred strategic sight lines. Finally, the organisation must take some responsibility for failing to promote HR as a strategic partner, casting it in a peripheral position, unable to break clear from the historic perception of people management rather than a tool for competitive advantage (Kaufman 2012; Beer 2015).

Wider investigation into current evaluation practice amplifies its problematic and contradictory nature. Evidence organisations prioritise other more pressing business concerns over evaluation (CIPD 2015) conflicts with its reported status as an organisational imperative. At the same time, these findings provide an insight into the organisational perspective, suggesting the problematics of evaluation impact not only implementation but motivation in practice. A research programme (Parry & Tyson 2007) focused on HR value measurement within the resource-based view (Lado & Wilson, 1994; Kaufman 2015), accepting the positive relationship between HRM and organisational performance (Liu 2007), found the majority of the 16,000 respondents questioned had no system in place to measure either impact or value. The CIPD (2008; 2013; 2014; 2015) thematically report organisations claim leadership coaching programmes aligned to business strategy; however, most struggle to evaluate the impact of their investments programmes on outcomes and goals (CIPD 2015). Yates (2015) supported these findings in terms of the dissatisfaction and lack of involvement experienced by leadership coaching stakeholders in how their investments were managed and monitored, reporting more than half of organisations researched did not know the span of the coaching programme being sponsored, nor were they part of a collaborative contract to agree outcomes.

A review of methodologies in the literature reveals the current state of evaluation in practice, and evidence of a short term focus. Many of these methods advocate an analytical scientific approach, thriving on scholastic discipline, actionable and measurable theory, and connected variables, suited to short term tangible outcomes (Cascio & Boudreau 2012). It is evident practitioners struggle to evaluate beyond tangible expectations and are limited to anecdotal and discretionary data collection. In 2013 the CIPD reported more than half of respondents used a variation of Kirkpatrick's (1959a; 1959b) four levels model for evaluation, and the majority measured no further than the initial, reaction level. Although Kirkpatrick's model (assessment at Reaction, Learning, Behaviour and Outcome levels) is criticised by some scholars (Bates 2004) as being outdated and irrelevant, it remains highly influential in thinking in this field. The continued reference to Kirkpatrick's taxonomy (1977), despite the ensuing period of rapid and dramatic contextual change, is, in part, due to its simplicity (Bates 2004), with a number of authors challenging the confusion of models and formulae, producing a surfeit of irrelevant data, leading to misuse, or discouraging practitioners altogether, regardless of the growing accountability imperative (McGovern et al 2001; Wall et al 2016). Models such as CIPP (context, input, process, product) (Stufflebeam 1971; 2003; Khalid, M., Rehman, C., & Ashraf, M. 2012) and CIRO (context, input, reaction, outcomes) (Rorak, Kim & Mupinga 2006), attempt to update historic thinking but, placed in the current context, fail to anticipate emerging leadership realities, focused on soft skills, and have no capability to assess behavioural change, nor are they equipped to accommodate diversity of outcomes and multiple interpretations, including the intangible benefits from leadership coaching (Tzeng, Chiang & Li 2007). Despite continued reliance on historic ideas, it is acknowledged in some literature that the principle of drawing inspiration from earlier models for evaluation has hindered progress and future thinking, facilitating limitations at operational and strategic levels (Passmore & Velez 2012).

There are, however, encouraging signs of progress in addressing evaluation problematics. Although many current methodologies are either versions of Kirkpatrick's taxonomy or emphasise self-reporting methods, it is argued by some authors that self-reporting techniques are becoming more sophisticated in addressing the evaluation of intangibles. For example, Grant's (2012) Personal Case Study approach is suggested as an accompaniment to standard evaluation metrics, asking the leadership coachee to reflect on personal challenges at an emotional and technical level to provide benchmarks to assess development. In doing so, it sets out to directly link a specific challenge to coaching dimensions in a bid to evince causality. Furthermore, self-reporting evaluation is claimed to be a positive advocate of leadership coaching, specifically when placed in the context of multi source ratings and feedback (Nieminen, Smerek, Kotrba & Denison 2013), where leaders receiving coaching reported significant development in areas of involvement, consistency and mission focused behaviours. Additionally, a number of authors acknowledge the need to address the inevitable presence of the intangible benefits that transcend conventional evaluation methodologies, requiring a complex system that is both summative and formative (Ely et al 2010; Ladegard and Gjerde 2014).

In characterising the distinctive process of leadership coaching, Ely et al (2010), in one of the few systematic designs specifically designated to leadership coaching, identify a unique set of needs for any evaluation system: for multiple stakeholders; for proximal and distal outcomes (as part of summative evaluation); for diverse sources of data and methodologies (as part of formative evaluation); for appropriate populations; for extended and indeterminate timelines (Grant & Zackon 2004). Although underpinned by a version of Kirkpatrick's four level taxonomy, these needs form a progressive systematic approach to evaluation of leadership coaching, requiring carefully selected evaluation criteria for multiple stakeholders and a multi-dimensional approach (Kraiger, Ford & Salas 1993). Furthermore, in terms of contingencies, there are reported attempts to recognise the connection between a constantly evolving context as the primary influence for emerging leadership outcomes, and an increasingly complex environment for evaluation (Russ-Eft and Preskill 2005; 2009). In trying to unravel the complexity of multiple influences and contingences, Russ-Eft and Preskill (2005) developed a system recognising internal and external forces, defining evaluation not only by the collection of data to enhance knowledge, but to inform wider strategic leadership decision-making. Beer et al (2015) focused on a multi-stakeholder approach, accepting leaders operate in a complex environment in which strategically aligned decisions are made on multiple outcomes, recognising both short and long term goals.

Leaders engage executive coaches for numerous reasons, many of which reflect the distinct nature of the intervention, accommodating the unique characteristics of both the individual (personality, beliefs and values) and the organisation (culture, management structure, stakeholders and outcomes). However, evidence shows organisations limit their focus to four specific short term outcomes, reflecting current operational requirements: performance management (developing leadership skills to acceptable standards); change management (developing skills for succession or promotion to a leadership role); career management (for retention and succession); talent management (as part of a future leadership capability) and organisational management (for succession) (Hall, Otazo, & Hollenbeck 1999; Hicks & Peterson, 1999; Witherspoon & White, 1997; Ely et al 2010). According to much of the literature, historic problems for evaluation categorised as contingencies, intangibles and strategic alignment persist; however, little attempt has been made to examine these in the current environment. Consequently, contingencies appear specifically relatable to pressures from short term accountability, workforce scalability and, crucially, vulnerable to a lack of focus on long term capacity building. Intangibles fail to encompass evolving leadership outcomes as well as the idiosyncratic nature of leadership coaching. Finally, strategic alignment emphasises financial accountability over balanced strategic decision-making, the crucial component of an adaptive strategy. It is evident current research approaches are failing to contribute knowledge for actionable practice, to narrow the gap between theory and implementation, thus increasing the anomalous and contradictory nature of evaluation and limiting scope for exploration of strategic opportunities emerging from the current context.

## Emerging contexts and implications for leadership coaching evaluation

According to Erikson and Dyer (2005) context matters, and conditions characterised by complexity, rapid technological development and external volatility, require organisations to adopt thinking and behaviours that differ significantly from those employed in previous periods of relative stability. It is also apparent that decision-making is further complicated by demographic shifts and a set of emerging values, assumptions, allegiances and philosophies that are new moderators for strategic alignment (Sparrow & Makram 2015). The literature reveals organisations, to be successful in the emerging context, look to their leadership capability to deliver an adaptive and creative strategy to drive growth and achieve desired outcomes (Fillery-Travis & Lane 2006); therefore, the continuous development of constantly evolving leadership skills has emerged as a key organisational investment. This investment coincides with intensifying accountability trends placing evaluation of impact of leadership coaching in the spotlight. However, evaluation continues to challenge organisations and, with a new set of organisational and leadership outcomes, the research gap between theory and practice is set to widen further. This section provides a review of literature, exploring emerging contexts, how they influence and shape organisational goals and leadership outcomes, and implications for leadership coaching and evaluation practice.

The literature in this field generally confirms the influence of variable contextual and contingent factors in shaping the emerging, organisational landscape (Kaufman 2015; Paauwe, Boon, Boselie & Hartog 2013; Erikson & Dyer 2005). Within this context, agility is considered the new key capability for organisations striving to become adaptive, as part of a strategy for competitiveness (Santos-Vijande, Lopez-Sanchez & Trespalacios 2012). Dyer and Erikson (2005) define an adaptive capability as internal fluidity, requiring organisations to make balanced decisions in allocating limited resources between financial and creative risks, simultaneously responding rapidly to external contingencies, operating in multiple directions and delivering a scalable workforce. However, although organisational needs have evolved with external contextualisation, developing an adaptive organisation is not considered a natural evolutionary process but a deliberate strategy (Shafer et al 2001), achieved by a new radical mindset to facilitate the purposeful dismantling of traditional hierarchical structures, the removal of departmental silos and the installation of systems that adopt workforce flexibility (Hatum 2010). Scholars assert a number of new influencers have emerged from the current context to shape or modify organisational outcomes, including: globalisation and technological developments; redefined strategic alignment; emerging leadership competencies and coaching dimensions; evaluation of leadership development investments; and human resource management (HRM) in the knowledge economy (CIPD 2014).

As part of the emerging knowledge economy, two key moderators for outcomes stand out in the literature: demographics and strategic alignment. It is asserted organisations must now emphasise management of demographic change, specifically in terms of current generational movement. The composition of the modern workforce is a rapidly shifting dynamic and at a critical juncture (Woods 2016): as Baby Boomers contemplate retirement, the next phase of the war for talent (Michaels et al 2001; Cappelli & Neumark 2004) is being fought out with Millennials, the emergent dominant HR focus, and a new critical variable, shifting the emphasis from the outer to the inner context (Mcdonnell 2011; Hatum 2010; Wall et al 2017). Therefore, organisations now strive to understand and react to the distinct differences in values and motivations of shifting generational populations in the workforce, to capitalise on the diversity of multiple generations rather than be hindered by a rigid outdated management structure that does not accommodate the flow of information between core business imperatives and innovative development strategies. To achieve this, the transference of knowledge has become a significant new target with which organisations are proactively engaged (McNicholls 2010), mindful of the distinctive characteristics of individual generational cohorts, influencing strategies for performance, innovation and succession (Woods 2016; Deloitte's Millennial Survey 2018). Therefore, succession emerges as a key focus, facilitated by decisions that ensure human resources are identified, managed, developed, retained and deployed in pivotal roles to be strategically aligned, simultaneously upgrading competencies and skills, where current profiles are now claimed to be outdated and irrelevant, (Michaels et al 2001; Mcdonnell 2011; Cappelli, 2008; Fernandez-Araoz, Groysberg & Nohria 2011).

Along with succession, the emerging context, characterised by uncertain macro-environment and intensifying accountability trends, has reoriented strategic alignment as an organisational outcome. In the past, scholars have urged organisations to demonstrate a chain of impact (Phillips 1997; McGovern et al 2001), informing traditional operational outcomes, to justify and forecast the allocation of budgets, while strategically attempting to answer questions about investment strategy and efficacy of processes (Reid Bates 2004). More recently, strategic alignment has emerged as an increasingly complex multidimensional target (Watson 2013), a key component of an adaptive organisation, with the capability to simultaneously exploit existing assets and skills (for short term outcomes) and invest in sufficient exploration to avoid being rendered irrelevant or uncompetitive by changes in markets and technologies (for long term goals). Furthermore, evidence that HRM delivers a wider strategic contribution to the organisation has elevated it from a transactional to a transformational process, intensifying the need to be strategically aligned with overarching goals (Angrave et al 2016; Kaufman 2015; Beer 2015; Becker, Huselid & Beatty 2009; Wright & McMahon 2011).

Set against emerging organisational outcomes, a corresponding set of leadership expectations has evolved. These are characterised by complex and adaptive thinking (Lawrence 2013), to make balanced judgements in response to a rapidly changing context, adjusting strategies more efficiently than competitors to gain adaptive advantage (Lawrence 2013; Passmore, O'Shea & Horney 2010; Petrie 2011). Mcdonell (2011) asserts HRM has become a distinct strategic leadership activity and, to deliver the greatest results, leaders need to have better decision-making capabilities when focussing on identifying areas of high impact and the effective deployment of HR (Becker et al 2009), facilitated by reconfigured internal organisational structures (Erikson & Dyer 2005). O'Reilly and Tushman (2011) assert that current organisational structures have not evolved with the external context, nor are they equipped to simultaneously manage the exploitation and exploration strategies of, what they refer to as, ambidexterity, where success is reliant on new and exceptional leadership capabilities to manage strategic conflict. Therefore, leaders are now expected to cultivate a capability to achieve a consensus of purpose, developing an organisational culture of collective understanding, behavioural integration and clear strategic alignment (Chen, Tang, Cooke & Jin 2016). This strategic mindset redefines leadership outcomes and coaching dimensions, to include collaborative cognition, strategic consensus, behavioural integration and high knowledge transference intensity (Van Wijk et al 2008; Smith & Tushman 2005; Lubatkin et al 2006; Yang 2007). Furthermore, it hands leaders the responsibility to nurture a culture of trust and knowledge reciprocity, to mitigate executive conflict, enabling contradictory knowledge processes to work in concert in pursuit of effective ambidexterity to become adaptive (Yitzhack Halevi et al 2015).

It is claimed, leadership is in transformation and the new significant challenge for organisations is understanding the value of its leadership outcomes and possessing an evaluation process for its coaching investments. Bass et al (2003) attribute four main competencies to transformational leadership: idealised influence; inspirational motivation; intellectual stimulation, and individualised consideration. These competencies remain thematic throughout contemporary literature, where new leadership outcomes are fundamentally characterised by intangible interpersonal skills, for dialogue, communication and engagement, as well as tangible management and technical capabilities. At the same time, despite recognition of new leadership coaching dimensions emerging from variables and contingencies, the role of evaluation continues to focus on traditional leadership management imperatives for: performance, change, talent, career and succession (Ely et al 2010; CIPD 2015; Russ-Eft & Preskill 2005; Yapp 2009). As organisations struggle with the impact of contingencies on traditional evaluation systems and designs, the dynamic context continues to intensify, reshaping organisational strategies, resulting in a new increasingly complex environment for evaluation, characterised by unconventional and unfamiliar outcomes for leadership, widening the knowledge gap, specifically in the design of an integrated strategically aligned practice framework.

The emerging context has influenced strategic dimensions of leadership coaching and reinforced the authorial claim that links strategic alignment with evaluation as connected outcomes, contending investment in human resource development, and specifically leadership coaching, is diminished in value unless it is associated with the implementation of organisational strategic intent (Boxall, Purcell & Wright 2007). In support of this, the Annual Survey Report (2014) from the CIPD states, in the current environment, organisations should strive to both align development with wider business strategies and ensure they are evaluated. Kraiger et al (2004) referred to a single outcome to develop a real theory of impact, through a system that deliberately sets out to connect evaluation with unique organisational initiatives, delivering strategic alignment through a clear understanding of business outcomes that count, with investments directly linked to organisational performance. In practice terms, Norton and Kaplan (2006) introduced the Balanced Scorecard. This recognised the limitations of financial measurements of performance, implying less support for long term goals and an emphasis in investment in areas easily measured. These authors began to explore the potential for underperformance as a result of one dimensional data from short term financial performance metrics, particularly of asset rich organisations, and the need to build and acquire intangible assets to drive real growth.

In the emerging context, authors generally agree that strategic alignment and evaluation outcomes are inextricably connected and, ideally, should work in concert. As such, organisations have the opportunity to re-examine the role of evaluation and ensure it works harder as a strategic implement, no longer viewed in isolation but as part of an integrated system, aligned to specific strategic goals (Phillips, Phillips & Edwards 2012), with a clear understanding of what is being measured, by whom and for what purpose. Therefore, selecting the right measurement tools and appropriate metrics in terms of the unique organisational context emerges as a key outcome and a critical design component to deliver data that is current, relevant and of practical value, operationally and strategically. Accordingly, the organisation should strive to be explicit, through strategic alignment, over what it expects from its leadership, how it develops its leaders, and what it considers valuable outcomes beyond one dimensional financial accountability (Yapp 2009).

The implications for evaluation are that current thinking in leadership coaching outcomes is actively intensifying existing problems of intangibles, strategic alignment and contingencies. Intangible outcomes are now seen as part of a deliberate strategy to foster collective curiosity (Erikson & Dyer 2005; Gino 2018), openness to change, knowledge sharing, creativity, and autonomy (Beltrán-Martín & Roca-Puig, 2013; Beltrán-Martín, Roca-Puig, Escrig-Tena, & Bou-Llusar, 2008; Chiva, Alegre, & Lapiedra 2007). At the same time, rapidly developing external contingencies have redefined strategic alignment fundamentally, requiring leaders to develop the mindset to define a crisis within a potentially permanent state of volatility (Erikson & Dyer 2005). Therefore, as the impact of external contingencies intensifies, placing increased importance on strategic alignment, a number of new, difficult to measure, strategic focal points for leadership have emerged, increasing the problematics of evaluation (Cheese 2010). These recognise complex and balanced decision-making between short and long term targets, including: identifying critical capability gaps, improving and modernising talent development systems, and developing leadership skills for a new era, by aligning cultures and values to strategic goals (Angrave et al 2016; Kaufman 2015; Beer 2015; Becker, Huselid & Beatty 2009; Wright & McMahon 2011; Thunnisen, Boselie & Fruytier 2013). Accordingly, desired outcomes are considered a constantly moving target for evaluation, to which many organisations fail to connect. A new set of influencers have reoriented dimensions of traditional barriers and limitations for evaluation, as leadership emphasis moves away from immediate short term imperatives to encompass ambidexterity (Benner & Tushman 2003; O'Reilly & Tushman 2013). This adds a further layer of complexity to perplex scholars and practitioners, challenging researchers to narrow the gap between theory and practice by contributing an understanding of the emergent moderators for evaluation in areas such as problematics and data usage.

## Leadership coaching evaluation practice through the lens of ambidexterity

The first two sections have provided an examination of the problematics of leadership coaching evaluation, and an investigation of emerging contexts and the implications for evaluation. This final section goes on to explore the traits of leadership coaching evaluation, shaped by increasing complexity, characterised by organisational leadership's capability to make balanced decisions over the allocation of limited resources between short term imperatives and long term strategic goals, conceptualised in the literature as ambidexterity (Duncan 1976; March 1991; Tushman & O'Reilly 1996; O'Reilly & Tushman 2013; Teece et al 1997). As a consequence, a new set of organisational and leadership outcomes has emerged against which it is claimed, understanding of evaluation problematics has not similarly evolved and continues to be investigated in an historic context. This section will initially make the case for ambidexterity as an appropriate and effective lens for research and then go on to explore how ambidextrous influencers shape emerging leadership expectations and coaching dimensions, and the implications for evaluation. Through this strategic lens, it will reframe the causal link, contended by many authors to be at the heart of evaluation investigations, as a potential strategic opportunity rather than a barrier. Finally, it will present a conceptual framework for research, derived from the literature, as an instrument to interrogate evaluation practice and collect data for analysis, to contribute insights for future research and development.

*The characteristics of ambidexterity: an appropriate lens for research*

March's definition of ambidexterity (1991), as the fundamental adaptive challenge for leaders to simultaneously exploit current capabilities and existing assets, while intentionally making time for exploration for competitive relevance in dynamic markets, is treated as seminal by some authors, succinctly encapsulating a diverse and complex concept. However, some scholars are sceptical about the overuse of ambidexterity as a research context for disparate phenomena (Nosella et al 2012; O'Relliy & Tushman 2013), arguing excessive interest in this subject has distorted March's definition and diminished the effectiveness of ambidextrous strategies to solve primary organisational challenges. Therefore, it is important this study considers the relevance of ambidexterity to the research area and does not merely treat it conveniently, at a contextual or organisational level, but nuances it to individuals in leadership positions. Literature defines a number of characteristics for ambidexterity that share common themes with the focus of this study, including unique interpretations across organisational sectors (Woodward, 1965; Lawrence & Lorsch 1967; O'Reilly & Tushman 2013), the positive association with organisational performance to thrive or survive (Caspin-Wagner, Ellis & Tischler 2012; Burton, O'Reilly & Bidwell 2012; Tushman, Smith, Wood, Westerman & O'Reilly 2010; Hill & Birkinshaw 2012; Yu & Khessina 2012), impact in uncertain times (Caspin-Wagner et al 2012; Junni et al 2013), and the influence of organisational context. However, it is the focus on leaders (the architects of ambidexterity), emerging leadership outcomes (representative of the current complex environment), and the assertion in literature that ambidexterity is fundamentally a leadership rather than a structural issue, that supports the research focus for this study (Smith, Binns & Tushman 2010; O'Reilly & Tushman 2011).

The unresolved issues for ambidexterity, have a problematic affinity with this study's focus. These include definitions of ambidexterity, where it is claimed researchers have used a generic simplistic description referring to the ability of an organisation to do two things simultaneously in a binary fashion (Birkinshaw & Gupta, 2013). There are also criticisms from scholars around ambiguous perspectives for exploitation and exploration as ambidextrous characteristics (O'Reilly & Tushman 2008; 2013). However, it is also reported, a significant source for ambidextrous problematics is evaluation, where ambiguous definitions for exploitative and explorative outcomes reflect the idiosyncratic nature of ambidexterity (Bierly & Daly 2007). Authors also point to the variation in researchers' treatment for evaluation of ambidextrous outcomes, either as separate exploitative or explorative measurements (Auh & Menguc,2005) or, as the sum of the whole (He & Wong 2004). Furthermore, timelines are perceived as a persistent problem for evaluation in a multitude of contexts, including the impact of ambidextrous strategies, with some authors arguing for either a one dimensional or continuous measurement (Lavie et al 2010). However, one of the most significant arguments in literature is whether exploitative and explorative outcomes, as separate constructs, should be thus treated as distinct areas of measurement (Birkinshaw & Gupta 2013; Junni 2013), or whether ambidexterity is a "harmonic" strategy (Simsek et al 2009) to be considered as a whole. Therefore, the contextual value, as well as the positive and critical perspectives for ambidexterity in literature, provide interesting shared themes with evaluation of leadership coaching, expanding its scope as a perspective for research beyond a one dimensional representation of the organisational context, to provide the basis of an effective conceptual framework to interrogate the research subject.

Outstanding questions around ambidexterity link to both leadership and evaluation. Ambidexterity has been studied in detail over the last 15 years and literature reports three versions, sequential, structural and contextual, which in the right circumstances may be applied, singularly or in collaboration, to leadership challenges around exploitative and explorative outcomes propositions. These versions reflect strategic agility, with organisations aligning strategies over time (sequential) (Duncan 1976), responding to rapid change (structural) (Tushman & O'Reilly, 1996), and by enabling individuals through processes to make professional judgements on ambidextrous balance propositions (contextual) (Gibson & Birkinshaw 2004). However, what remains problematic, and seldom addressed in research, is the role of leadership in executing ambidextrous decision-making (Alexiev, Jansen, Van den Bosch & Volberda 2010; O'Reilly & Tushman 2011; Carmeli & Halevi 2009). Alternative research perspectives were considered for this study, including organisational resilience (Bhamra, Dani & Burnand 2011) and entrepreneurship (Grégoire, Corbett, & McMullen 2011). The former was rejected because it emphasised the organisational response to turbulent events, which since the global financial crisis of 2008 have been claimed to be normalised and absorbed into day-to-day strategy. Furthermore, it was felt the negative connotations of resilience as an ability to return to stable conditions, was not representative of positive adaptive strategies organisations were adopting for high performance. Entrepreneurship was also rejected as being too narrowly focused, emphasising risk taking and innovation, and not considered a broad enough context in which to study evaluation. In a call for more qualitative and detailed research, scholars are keen to understand how leaders manage the tension between exploitative and explorative outcomes, specifically in organisations that have paradoxical strategic intents (Smith & Lewis 2011). Furthermore, evaluation of ambidextrous outcomes mirror leadership coaching dimensions, continuing to emphasise measurable exploitative targets such as improved efficiency or the refinement of extant services or products (Bierly & Daly 2007; Gibson & Birkinshaw 2004; He & Wong 2004; Jansen, Van den Bosch & Volberda 2006), while practitioners still seek clear definitions for exploitive and explorative targets.

*Ambidextrous organisational and leadership outcomes*

Therefore, organisational goals have been refined by an ambidextrous perspective. The dominant challenge for leaders now being to make balanced and complex decisions between short and long term priorities, simultaneously exploiting (characterised by efficiency, certainty and control) existing assets and skills while investing in exploration (characterised by discovery, autonomy and innovation) with no immediate economic legitimacy for future competitiveness (March 1991; Thunnissen, Boselieb & Fruytier 2013). Accordingly, organisational outcomes currently flex between: financial and cultural risk (Beer 2015); responsiveness to trying times and anticipation for recovery, requiring behaviours that differ significantly from periods of stability (Erikson & Dyer 2005); HR scalability and capacity building, transitioning from one configuration of HR to another (Ibid); high impact pivotal roles and investment in superior long term training and development (Lepak & Shaw 2008); recruitment and retention of a disloyal generation (Skillings 2008), and succession (Cappelli 2008; Fernandez-Araoz 2014); and a culture of cost and investment (Wright & McMahon 2011). This requirement for flexibility challenges leaders to simultaneously pursue incremental and discontinuous innovation, placing emphasis on the organisation's ability to work in concert with multiple conflicting structures, systems and cultures, and reorient and expand the scope of leadership priorities, away from people management to create strategic contributions from the workforce, for either short term exploitation or long term exploration (O'Reilly & Tushman 2013; Wright & McMahon 2011).

The assertion that leadership is the mechanism to create ambidextrous structures (Yang et al 2016; Smith & Tushman 2005; Lubatkin et al 2006; Jansen et al 2008), to generate competitive differentiation through evolutionary and innovative change

(Tushman & O'Reilly 1996), deliver adaptability and alignment (Gibson & Birkinshaw 2004) and simultaneously pursue exploratory and exploitative innovation (Benner & Tushman 2003), is thematic throughout literature. Scholars suggests three leadership attributes for achieving ambidexterity, now the focus of leadership coaching: shared vision (to motivate and generate opportunities); social integration (for effective communication); and contingency rewards (recognising incentivised compensation for a wider contribution) (Hambrick 1994; O'Reilly & Tushman 2004; Siegal & Hambrick 2005; Smith & Tushman 2005). Accordingly, leadership coaching has evolved to include: cognition, as opposed to intelligence which, in isolation, is considered insufficient (Lubart & Mouchiroud 2003); knowledge, a key variable in exploratory development; motivation, significantly influenced by the organisational leadership culture; personality, specifically openness to experience (Batey & Furnham 2006; Harrison et al 2006); behaviours; emotions and mood states; and developmental factors such as background and existing culture. Therefore, it is claimed, the scope of leadership coaching has expanded to facilitate change in the areas of: people management, relationship with management, goal setting and prioritisation, engagement and productivity, and dialogue and communication.

In dismantling existing structures to deliberately accommodate ambidextrous strategies, organisations are dependent on unfamiliar standards of exceptional leadership to orchestrate strategic change and manage through potentially damaging internal conflict, by creating an environment of collective understanding and strategic consensus (Chen, Tang, Cooke & Jin 2016). Therefore, the ambidextrous mindset influencing organisational goals has impacted on leadership outcomes and significantly expanded the scope of required skills to include: delivering a culture of trust to enable collaborative cognition, behavioural integration and knowledge reciprocity (Yitzhack Halevi et al 2015). As organisations look to their leaders to deliver a new set of outcomes, leadership coaching is challenged to refocus to keep up with the pace of change. It is also argued that ambidextrous outcomes imply distinct leadership coaching foci: on training and specific short term targets for exploitative development; and a new set of long term challenges, to support and nurture, innovation and creativity, within the existing problem area of contingencies (including a multigenerational workforce), intangibles and strategic alignment (Patterson et al 2009). As a result, the focus for leadership coaching takes on a broader strategic scope, the outcomes of which, albeit well defined, are both tangible and intangible, along variable timelines, ranging from attitude and behavioural development, to strategic alignment and operational accountability, with significant implications for evaluation.

*A causal link for evaluation*

Despite the connection between ambidexterity, emergent outcomes and leadership coaching foci, organisations struggle to meet the challenge of an adaptive strategy in practice. Since the global financial crisis, research has found attitudes of leadership weighted towards shorter term outcomes, intent on providing a full return on current capabilities, less concerned about longer term goals, thereby running the risk of failing to adapt these capabilities in a period of uncertainty. Similarly, the focus for evaluation remains primarily on tangible short term targets, chiefly measured financially (Yapp 2009; CIPD 2015; Russ-Eft & Preskill 2005), even though the majority of scholars agree emphasis on leadership outcomes has moved towards explorative behaviours, potentially widening the gap with evaluation (Beer 2015). Where literature does address the development and design of evaluation, it is predominately focused on causal link. For instance, the contingency framework introduced by Lepak and Shaw (2008) asserts the need for an integrated evaluation system, connecting HR behaviours, flexibility, responsiveness to contextualisation and organisational performance. At the same time, it acknowledges that, regardless of the positive association reported in literature (Cao, Simsek, & Zhang 2010; Patel, Messersmith, & Lepak, 2013), the causal link with adaptive performance is not empirically established, and this may in part explain the evident lack of drive to evaluate. It could be argued, a dominant traditional HRM perspective for research has contributed to this, specifically where evaluation, perceived in isolation as part of a narrow context, makes only a limited strategic contribution to practice knowledge (McGovern et al 2001; Wall et al 2017).

At this time, organisations and scholars alike recognise and place increased emphasis on emerging ambidextrous leadership skills, as part of a wider strategy to respond to a persistent period of complexity. This study supports Kraiger et al's (2004) assertion that clearly aligned strategic outcomes are the driving force behind evaluation, contending organisations need a new source of data to inform complex decision-making, through a current perspective, reframing what is being measured, by whom and for what purpose. Derived from literature, and facilitated by ambidexterity as a strategic perspective, this study has designed a conceptual framework for ambidextrous leadership to examine evaluation, by connecting current organisational outcomes to leadership coaching and its evaluation. It also sets out to challenge the scholarly pre-occupation with the unique and idiosyncratic process of leadership coaching, as a persistent limiter of progress in this field, providing a structured, multi-perspective integrated approach, by clearly defining leadership as the key resource to establish strategic renewal and dynamic capabilities, through the simultaneous exploration of new thinking and the exploitation of existing knowledge domains (Kang & Snell 2009).

*A new conceptual framework from a synthesis of literature*

Despite representations in literature of integrated evaluation systems including HR analytics, value inventories and score cards, connecting leadership outcomes to internal and external organisational context, scholars and practitioners alike have failed to narrow the gap between evaluation theory and practice. The literature presents a number of reasons for a lack of progress: multiple definitions, prioritising interests and conflicting perspectives that mean findings are vulnerable to bias (O'Reilly & Tushman 2013; Nosella, Cantrello & Filippini 2012; Kaufman 2012); the diverse and idiosyncratic nature of leadership coaching (Liljenstrand & Nebeker 2008; Ely et al 2010); and the one dimensional proprietorial approach adopted by researchers, treating the subject as mutually exclusive, limiting access to broader academic references (Thunnissen et al 2013), restricting insights into the complex organisational dynamic (Greenwood & Miller 2010). The current unsatisfactory state of research comes at a time when organisational investment in leadership coaching is significant and increasing, and evaluation is now perceived as an organisational priority (CIPD 2014). Counter intuitively, with evaluation in the spotlight, evidence finds a large percentage of organisations are disengaged or demotivated by the evaluation process (CIPD 2015), supporting the claim research is out of step with the current needs of the organisation and, specifically, a new set of leadership outcomes.

Wall et al (2016) refer to the gap between scholarly research and practice, claiming progress is hindered by the complexity of research, manifest in terms of dissonance, communication and access, which is failing practitioners who seek workable tools. This is reflected in various conceptual frameworks devised to investigate evaluation, which, despite espousing an holistic overview, generally adopt an historic or narrow prioritisation perspective. These approaches tend to be based on the assumption that motivations behind evaluation are twofold: to assess outcomes (summative evaluation) and to enhance programme design (formative evaluation). Specifically, Ely et al (2010) explore the field through a multifaceted framework, distinguishing between outcome and process criteria, treating formative evaluation as a separate component of a summative evaluation framework. Ladegard and Gjerde (2014) draw upon their framework to explore two generic leadership outcome variables: leadership role-efficacy (LRE) and leadership trust in subordinates (LTS). These variables go some way to recognising the intangible nature of emergent leadership and leadership coaching outcomes, such as: mastery of the role, confidence and judgement (LRE) (Paglis 2010), and strengthening interpersonal relationships with, and empowerment of, subordinates (LTS). However, the approach is one-dimensional, primarily focused on specific leadership outcomes, therefore limited strategically through a lack of reference to the complex environment within which leaders currently operate.

Evaluation frameworks in literature generally refer to distinct formative and summative approaches to investigate operational and strategic aspects of evaluation; whereas at the same time, they adopt a narrow perspective, confining operational (formative) application to coaching practice and future design, and strategic (summative) examination to traditional, and sometimes very specific, leadership outcomes and behavioural change. Furthermore, these frameworks have been designed as potential evaluation models, developed to provide solutions to reported problematics and limiters. The conceptual framework (***Table 1***) in this study is specifically designed as a research tool to address the limitations of leadership coaching evaluation knowledge and practice, reflecting the complex environment, through ambidexterity. In emphasising the impact of the current dynamic organisational landscape, this conceptual framework contends context is fundamental to research (Beer 2015; HakhemZadeh & Baba 2016; Bartunek & Rynes 2014), while simultaneously mapping out emerging leadership outcomes and, despite its complex and diverse nature, a focus for leadership coaching, and a broader platform from which to explore an integrated evaluation system.

*Table 1:* Research conceptual framework for ambidextrous balance (see **Endnotes 1**)

| **Exploitative ambidextrous characteristics: Short term - known outcomes** | **Explorative ambidextrous characteristics: Long term - Unknown outcomes** | **Ambidextrous balance proposition** | **Emergent leadership coaching ambidextrous dimensions from the literature to develop approaches for:** | **Implications for dimensions of evaluation** |
|---|---|---|---|---|
| Financial risk *1- pressing business imperatives with strong financial legitimacy | Cultural risk *1- long term vision through innovation, creativity and capacity building with weak financial legitimacy | Performance versus future competitive relevance | Managing risk *1 | Balancing performance with competitive relevance in the context of managing risk |
| Respond - Operate in a complex *2 but known environment | Anticipate - Operate in a complex *2 but unknown environment | Complex environment versus opportunity generation | Managing change *3 | Balancing a complex environment with opportunity generation in the context of managing change |
| Scalability *4 | Capacity building *5 | Efficiency savings versus talent management | Managing multiple conflicting structures and systems *5 | Balancing efficiency savings with talent management for pivotal roles in the |

| | | | | |
|---|---|---|---|---|
| | | for pivotal high impact roles | | context of managing multiple structures |
| Allocation of resources to areas of high impact *5&6 | Allocation of resources to areas of future development *5&6 | Budgetary justification versus culture of collective understanding | Strategic alignment *7 | Balancing internal budgetary justification with a culture of collective understanding in the context of managing strategic alignment |
| Recruitment and retention *8 | Succession *9 | Management versus leadership | Social integration and relationship management *10 | Balancing management with leadership perspectives in the context of managing social integration and relationships |
| Cost - training *11 | Investment - coaching *11 | RoI versus wellbeing and engagement<br><br>Coaching efficacy versus awareness of fuller range of coaching outcomes | Professional judgement *12 | Balancing RoI with wellbeing and engagement in the context of managing professional judgement Balancing coaching efficacy with a fuller range of coaching outcomes |

### Chapter summary and conclusion

This chapter has explored literature in terms of what is currently known, what is emerging and a research context for what the future for evaluation might look like. Initially, it has built upon the practice issue by providing a deeper understanding of this area, specifically new influencers of evaluation problematics and the causes for the evident gap between evaluation theory and practice implementation. Secondly, it has reviewed what scholars and practitioners have reported about the emerging dimensions of leadership and leadership coaching, resulting from an uncertain and volatile operating environment. Finally, it has made the case for ambidexterity as a unique lens for research, representative of current and emerging leadership challenges and a potential facilitator of strategic opportunities for evaluation, introducing a new conceptual framework as a tool for research.

As a lens for research ambidexterity expanded the potential scope for evaluation, challenging the continued use of outdated concepts as models for a different time. In addition to providing currency for investigation, the ambidextrous perspective also addresses the other reported limitations of the current research environment: accepting multiple definitions and priorities; rationalising new leadership outcomes to provide a structured focus for leadership coaching and, in doing so, demystifying the process; and a multi-dimensional integrated approach for wider understanding. This has been achieved through a focus on decision-making, emphasising ambidextrous balance propositions as pivotal, and treating diverse drivers and motivations for evaluation stakeholders distinctly as part of a wider focus on ambidextrous outcomes for performance or development. The conceptual framework for research also explains the contribution of intangibles by placing them in a strategic context focused on leadership choices, providing evidence of a causal link for evaluation. By using an approach that emphasises strategic perspectives, traditional barriers are recognised in the scope for evaluation, highlighting areas of consideration for future design of an integrated system, rather than being isolated as persistent problems for investigation. In this way, research is not confined to discussing solutions for evaluation problematics, but also placed to contribute to the wider debate around areas such as RoI, timelines and the potential for evaluation data to inform the wider strategy.

# Chapter 3 - Methodology & Methods

## Introduction and underlying assumptions underpinning research

The previous chapter introduces the concept of ambidexterity as a perspective for research and an appropriate strategic lens for examination, moving beyond a science paradigm to study in an environment reflecting the current complexity of leadership, as a way to narrow the gap between evaluation theory and practice. In addition to scholarly criticism detailed in the previous chapter, this study has also considered the two schools of thought regarding limitations resulting from an evidence-based research approach. Although the majority of authors argue evidence-based research needs to be increased (McGurk 2012), an alternative view criticises the evidence based approach, arguing it is one dimensional and limits understanding of problematics (Morrell & Learnmouth 2015; King & Learnmouth 2015; HakhemZadeh & Baba 2016; Bartunek & Rynes 2014; Gubbins & Rousseau 2015). These authors argue such an approach restricts the researcher's ability to engage with the real life issues faced by organisations to deeply comprehend the diverse and layered complexities of the subject. They advocate an approach that encourages intellectual pluralism, multiple perspectives, open dialogue and the challenging of assumptions (Morrell & Learnmouth 2015), to produce new knowledge of practical value (HakhemZadeh & Baba 2016; Wall et al 2017). Accordingly, this study uses ambidexterity to provide a unique perspective for new insights. In doing so, it will place in context the three broad research questions resulting from the themes emerging from literature, by connecting them to the line of questioning in the semi-structured interviews, filtering them through a lens of ambidexterity, directly linking them to the three organising corresponding themes emerging from data.

Having established a strategic context, this chapter outlines the flow of research from broad conceptual areas to specific procedures, mapping out the research process to record the rationale for design, data collection and data analysis by providing a set of cautious answers (Silverman 2006) to explain and justify methodology and methods used. To reflect the nature of reality, characterised by organisational ambidexterity, a number of underlying assumptions were considered to underpin the research design. These assumptions have influenced the research methodology and methods in areas including: the research relationship; the values of the research; the language of the research; and specific procedures employed. The table below illustrates the implications of these assumptions in consideration of the research approach, encompassing the nature of the practice issue and the strategic lens for investigation:

***Table 2*:** Philosophical assumptions with implications for research (Creswell 2003)

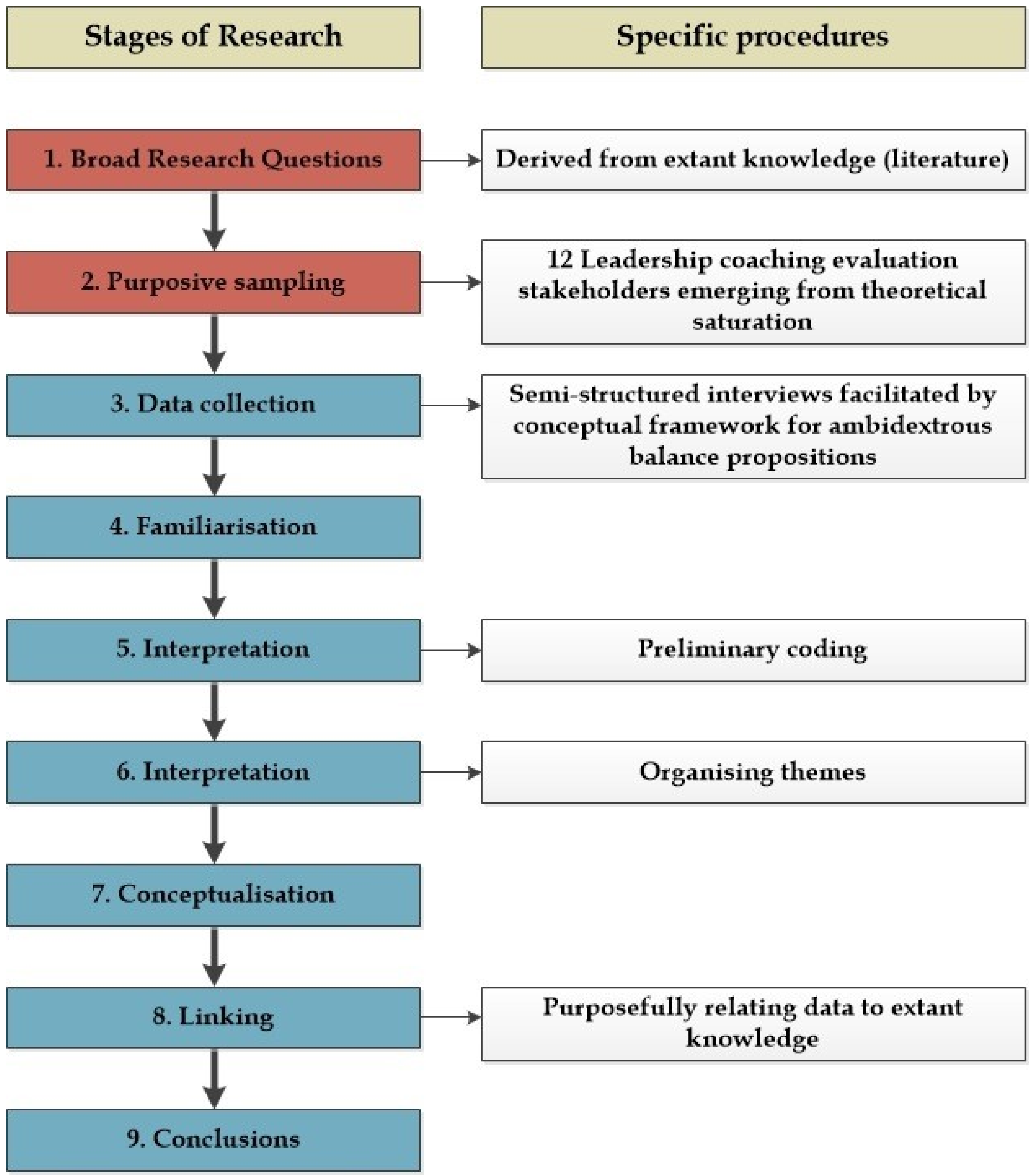
| **Philosophical stance** | **Assumption** | **Implication for research** |
|---|---|---|
| Ontological | The emerging context, characterised by ambidextrous balance | Reality is subjective and has multiple interpretations in this study |
| Axiological | Emergent leadership outcomes and leadership coaching focus | Research is value-laden and susceptible to bias |
| Axiological | Impact of ambidextrous balance on future research and development for evaluation | Multiple interpretations of strategic ambidexterity value |
| Methodological | Interpretivist methodology | Inductive logic and an emerging design |
| Epistemological | The relationship between the researcher and the subject | Purposive sample |

| | | |
|---|---|---|
| Rhetorical | The significance of language, tone and nuance in semi-structured interviews | Audio recordings and re-reading transcripts |

## Description of study and research philosophy

This is an inductive investigation, adopting an interpretivist approach, collecting and analysing qualitative data to develop knowledge and theory in leadership coaching evaluation practice. It is designed as an exploratory study (Wilson 2010), intent on addressing the gaps in existing knowledge by providing a practitioner perspective to retrieve valuable new insights into the subject, specifically where research is reported to be lagging behind other significant aspects in this field, such as emerging leadership outcomes and coaching dimensions. As a method for data collection, it will conduct a series of semi-structured interviews with a small sample, to facilitate in-depth discussions around individual experiences and perspectives. Once data has been collected, this research follows the main stages of a qualitative approach (Bryman & Bell 2015; Ladge et al 2012; Stokes & Wall 2014) including, familiarisation, interpretation and conclusions. As part of this process, data will be conceptualised by connecting themes across an ambidextrous framework, derived from literature, to look for insights and promising movements. This study aims to pursue translational research data (Woolf 2008), resulting in actionable knowledge, specifically in terms of the third broad research question and discussions around a potential structure for evaluation practitioners.

*Figure 1:* Outline of research procedure for qualitative data




Informed by the conceptual nature of this study, the research philosophy underpinning the methodology and procedures engages with an interpretive epistemology and a subjective ontology. An interpretive epistemology has been chosen as an appropriate approach to retrieve qualitative data from an empathic understanding of participants' experiences and interpretations of contexts, rather than the contexts themselves (Bryman & Bell 2015). This study is interested in how practitioners experience leadership coaching evaluation under the influence of ambidexterity, and an epistemological stance is rationalised for two main reasons. Firstly, to produce insights and realities reflecting approaches, attitudes, problematics and limitations of evaluation in the emerging context. Secondly, to recognise the implications, for leadership coaching evaluation research and development, of outcomes emerging from ambidexterity, to develop data by focusing on the experiences of participants in practice, and contribute insights to understanding in this field.

Stokes and Wall (2014) define subjectivity as recognition of the role of individual perspectives in the creation of data. The acceptance that within a shared purview, variations and multiple interpretations exist is key to the approach of this research. As an interpretative study, a subjective stance accepts myriad interpretations and perceptions as a source for exploration, from which it is intended that a rich vein of data will emerge to make sense of what is happening in this field (Stokes & Wall 2014). Due to the subjective values adopted, a reflexive approach is required to interpret the data, exercising the professional judgements of the researcher to avoid anecdotalism (Silverman 2006), described by scholars as a potential problem for this type of research. Questions of validity are covered later in this chapter; however, this study deals with contrary points of view as a way of providing reliable data that is wholly representative of a diverse sample, avoiding generalisations. Therefore, a subjective ontological stance is deemed appropriate; exploring attitudes to ambidexterity as the emerging context, and significant variations in participant interpretation, motivation and implementation in leadership coaching evaluation practice. Furthermore, relativist values are applied to acknowledge and accommodate varying views of reality from unique individual perceptions of participants, in line with the interpretative approach of this study (Whittle & Spicer 2008).

## Broad research questions

Despite connotations for quantification from evaluation as a subject for research, qualitative data was felt to be appropriate due to the contextual sensitivity (Silverman 2006) scholars report had previously limited research in this field. Three areas of sensitivity characterise the research context: multiple unique interpretations and perspectives, specifically from evaluation stakeholders and evaluation status (those making judgements on leadership coaching evaluation and whether systems were formal or informal); the idiosyncratic nature of leadership coaching characterised by emerging intangible outcomes (Ely 2010); and a dynamic workplace that is constantly evolving. Characterised by these contextual traits and derived from extant knowledge, the initial source for qualitative data is the three broad research questions from emerging themes in literature, specifically, evaluation problematics; emerging contexts; and evaluation as seen through a lens of ambidexterity:

1. What are the experiences of those making judgements on leadership coaching evaluation in terms of exploitative and explorative outcomes?

2. What are the problematics to evaluation and the implications of the emerging context, characterised by organisational ambidexterity, for future research and development?

3. How might a framework that places ambidextrous balance propositions in the context of leadership coaching dimensions support practitioners in undertaking evaluation?

## Methodology, data collection and sampling methods

To address these questions, this study engages with participants in an interactive-style, specifically semi-structured interviews as an instrument for data collection. This style of interview is appropriate to the interpretivist and exploratory nature of the research question, allowing flexibility to expand on participants' responses to broad questions and pursue more specific and detailed avenues of inquiry as they emerge. This approach also reflects the senior status of the purposive sample, and the unique organisational context. It is designed to elicit descriptions and reveal experiences through individual perspectives, for high level broad areas of discussion and in-depth development, facilitating a comparative structure to uncover themes, competing meanings and priorities. Accordingly, it adopts a small sample and distinctive approach to data analysis, including subjective and reflexive techniques, such as experienced-informed subjectivity. Furthermore, a cross-sectional style of investigation is employed, conducting interviews across organisational sectors (private, public and third) to produce data that is widely representative of different organisational contexts (Eggert & Helm 2003; Stokes & Wall 2014). The semi-structured are facilitated by a conceptual framework (***Table 1***) for ambidexterity, as a point of reference. This framework is designed to reflect emerging known and unknown outcomes, determining a balance proposition for leadership, leadership coaching foci and implications for the dimensions of leadership coaching evaluation research and development. Data is then analysed through a system of coding (Saldana 2012), identifying basic themes and organising themes relating to the broad research questions. Alternative methods of data collection were considered including questionnaires, participant observation and focus groups. Questionnaires were not used as they were not suited to producing descriptive answers to develop the line of inquiry, key to the exploratory nature of this study. Participant observation, focus interviews and focus groups were rejected as impractical due to the high status of the sample, where it was felt to be either invasive or difficult to moderate. Furthermore, the subject explored areas of organisational sensitivity requiring confidentiality.

Similar to questionnaires, structured interviews were considered too inflexible, while the most likely alternative, unstructured interviews, was not used due to the conversational style of the process, not suited to being directed at the specific focus on evaluation in the research context.

Linked to broad research questions, related inquiries were posed to participants via the semi-structured interviews, selected as a style of questioning, encouraging participants to explore their own unique points of view without prescribed boundaries and in detail. The interviews were carefully designed, with potential participants initially contacted to introduce the nature and purpose of the research, to assess both suitability and willingness. During the subsequent interviews, professional coaching techniques were used to build rapport with interviewees at an early stage to assist with the collection of data. Interviews were conducted face to face to fully engage participants. The flexibility afforded by this approach (Prasad 1993), allowed interviews to develop a set of 'grand tour' and 'mini tour' questions (Spradely & McCurdy 1972) with emergent data. 'Grand tour' questions were deliberately generic, accompanied by open-style prompts and subsidiary questions, designed to develop broad areas of discussion for rich and expansive responses. The role and position of semi-structured interviews in the data collection process is illustrated in ***Figure 3***. At the start, participants were introduced to the interviews through key words, phrases or descriptions relating to ambidexterity as a process of orientation. An initial question relating to the organisation provided context for the data and linked to open questions on experiences of leadership coaching, leadership coaching evaluation and use of evaluation data. Interview questions and responses were then developed through prompts or 'mini tour' questions with reference to the conceptual framework, to explore both the impact and implications of an ambidextrous perspective on evaluation. In addition, the coaching expertise of the researcher in building rapport with the participant to elicit rich data, using active listening techniques (Silverman 2006; Noaks & Wincup 2004), was felt to be helpful to this procedure.

A small purposive sample took part in the semi-structured interviews, selected for its relevance and diversity across organisational sectors and evaluation perspectives (operational or strategic). For this study, the researcher drew upon his professional network to invite potential participants to contribute. Participants were selected from those in positions required to make judgements on leadership coaching evaluation. The sample was formed of 12 respondents, interviewed over a period of three months. It was limited to high status evaluation stakeholders as a deliberate strategy to open up the decision-making process to gain rich insights into real life organisational dilemmas (Wright et al 2016). Theoretical saturation (Strauss & Corbin 1998; Guest et al 2006; Treviño et al 2014) was used as the criterion for the sample size. Saturation was judged to have occurred when new data ceased to contribute new insights. The status of those participating meant that this was achieved by the relatively small sample. Furthermore, when categories emerging from data were felt to be sufficiently developed to provide variations for contrast and comparison, saturation was claimed, with the diversity of the purposive sample, a contributory factor. Participants were selected from an organisational perspective across private, public and third sectors. ***Table 3*** summarises participant profiles and sectors. The uneven number of interviews across sectors (7 private, 3 public, 2 third), in part, reflects the strategic emphasis placed upon leadership coaching and the multiple perspectives from the private sector. The sample included one leadership coaching consultant in her capacity as a CEO of a private sector company; otherwise, coaching practitioners were specifically excluded to maintain the integrity of the research focus. Interviews were scheduled to last for one to two hour and were designed around the three generic questions and accompanying prompts. Due to the size of the sample and, as an interpretivistic study, generalisabilty is limited and emphasis is placed on in-depth close examination of theoretical and exploratory domains rather than representative claims. A version of the conceptual framework was used by the interviewer to develop prompts ('mini tour' questions) and responses from participants, in a way that maintains focus on an ambidexterity.

*Table 3:* Summary of participants and pseudonyms

| **Participant (pseudonym)** | **Position** | **Sector** |
|---|---|---|
| Alan | CEO. UK Real estate | Private |
| Peter | CFO. Global entertainments | Private |
| Daisy | HRD. UK Real estate development | Private |
| Charlie | Managing partner. General practice surveyors | Private |
| Alice | Executive Director of Programmes. Education charity | Third |
| Gill | Head of Talent Outreach Programmes, EMEA. Global technology | Private |
| Jimmy | Director of People and Change. Law and order | Public |
| Elaine | CEO. Executive coaching | Private |
| Owen | CEO. National homelessness charity | Third |
| Chrissy | HRD. Global energy | Private |
| Sara | CEO. Education | Public |
| Ed | Director of Graduate Development. Education | Public |

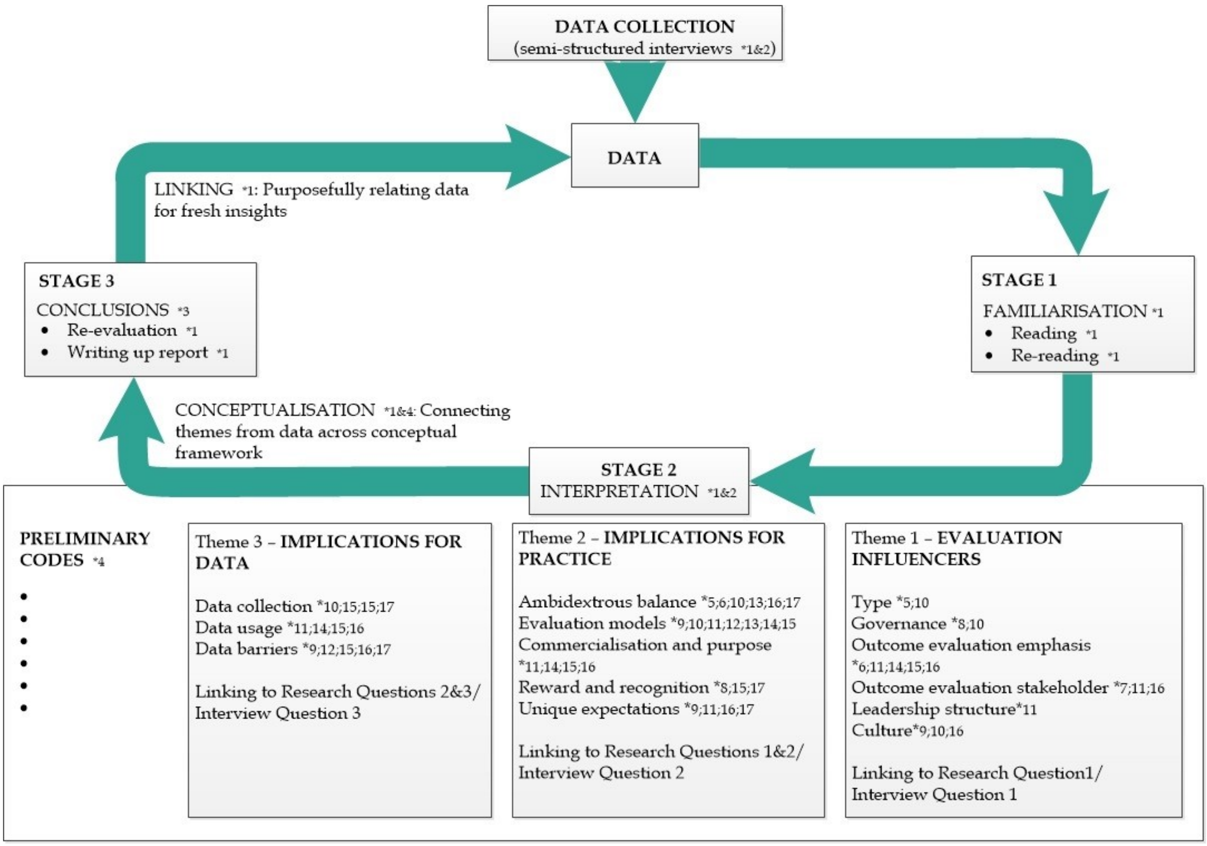
Prior to conducting semi-structured interviews, four pilot interviews were carried out. These served three main purposes, firstly to develop generic questions and accompanying prompts to elicit data aligned to the three broad research questions.

Secondly, these usefully developed interview techniques and informed judgements for timings in the formal process. Finally, they were seen as a strategy for validity, testing the semi-structured interview method as the likely producer of dependable data. As the process progressed, pilots provided an opportunity to anticipate vulnerability to anecdotalism (Silverman 2006) and techniques were tested and designed for validity, including: constant comparison, internal comparison and tabulations (Silverman 2010a; Stokes & Wall 2014). Participants from the pilot interviews were considered, but not included in the final research sample, as the resultant data was reflective of the developmental stage of the research inquiry, and the participants were not representative of the main target of this study.

## Methods for data analysis

Qualitative data emerging from an interpretivist methodology via the semi-structured interviews was analysed in key stages. The breaking down of these stages into research analysis actions has been guided by the range of steps proposed by Easterby-Smith et al (2012), including reflection; conceptualisation; coding and re-coding; linking; and re-evaluation. ***Figure 2*** provides a detailed explanation of the stages of data analysis (previously outlined in ***Figure 1***). The summary of codes and basic themes in this figure are further developed in ***Figure 3*** to reflect the responses of participants. Interviews were audio recorded with their permission and transcribed. Audio recordings were useful to the collection of data for two reasons; firstly it allowed the documentation of not only what participants said, but how they said it (particularly helpful due to the number of anomalies and contradictions resulting from the data) and, secondly, it enabled active listening through minimising note taking and developing emerging prompts to facilitate in-depth discussions. It was also considered valuable to record and transcribe interviews as part of the process for reliability, validity and generalisability, specifically in terms of the professional judgement of the researcher/interviewer in the context of anecdotalism and interpretation of data. Having transcribed data, an accurate record of what was said was available for reading and re-reading as part of a process for familiarisation. The thorough examination of the data, characterised by multiple interpretations, diverse motivations and drivers, and different organisational sectors, meant that the opportunity to re-examine and reflect was significant in generating themes for coding.

*Figure 2*: Three stages of data analysis (see **Endnotes 2**)




The second stage of this process involved the interpretation of data. Data was processed through three cycles of coding to produce analytical categories or themes. Although the data analysis methods used in this study are not specifically designed around grounded theory, it adopted open and axial coding techniques as convenient notions of systemisation of data. This partial adoption is justified due to the over-structured and highly systematic approach of grounded theory which was in contrast with the flexibility of the data collection process and considered unhelpful to the interpretation of the resultant qualitative data. Due to the size of the sample, frequency of words or phrases was unsuitable for coding categories and classifications. Rather, experienced-informed subjectivity was used to make choices regarding participants' responses, using descriptive statistics to form a contextually based thick description (Geertz 1973; Lincoln & Gubba 1985). This approach enabled analysis of cultural context and meaning participants' placed on evaluation, and also facilitated comparisons across sectors. The first cycle involved open coding as the preliminary procedure to break down interview transcripts to capture the narrative flow of what had been said and to begin to categorise and conceptualise data. Data was included in preliminary codes, determined with reference to the three broad research questions, linked to the generic semi-structured interview inquiries, and the conceptual framework to ensure adherence to the research focus. Accordingly, coding decisions were made against a checklist of related questions, which were also designed to encompass cognitive, emotional and hierarchical meanings to capture culture, internal contexts and influences, and values of senior management (Lofland et al 2006) including:

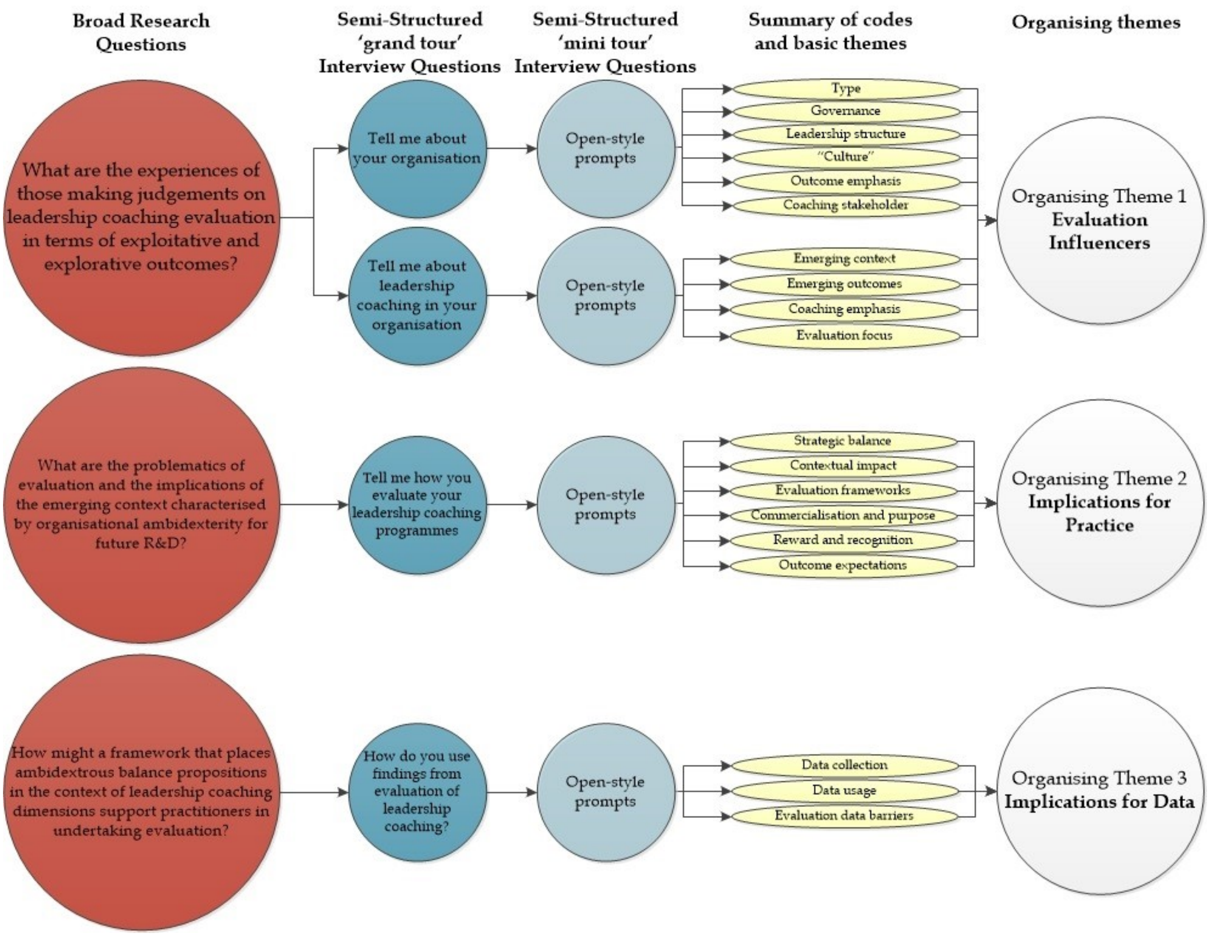
- What type of organisation, and what is the emphasis on exploitative and explorative outcomes?
- What is the organisation's approach to leadership coaching?
- How does the organisation evaluate leadership coaching and what are the processes in place?
- How does the organisation collect and use data?

Preliminary codes produced broad labels across cultural and operational contexts ranging from sector and size, to leadership hierarchies and cultural dimensions. These were then categorised into secondary codes and basic themes as part of the second cycle of coding: the axial phase. These secondary codes began to seek out relationships and interconnections (Stokes & Wall 2014), linking codes to contexts, outcomes, patterns of implementation and causes. Experienced-informed subjectivity was again used, with reference to the research conceptual framework (Miles & Huberman 1984), to make decisions about classification into basic themes. From these, three organising themes (significant clusters of relatable and interconnected categories, summarising principal assumptions from groups of basic themes) emerged as part of the third cycle:

- Evaluation influencers
- Implications for evaluation practice, present and future
- Implications for data

*Figure 3* shows data collection and data analysis stages in a practical research context, and how organising themes, filtered through the process of semi-structured interviews, as a lens for ambidexterity, are relatable to the three broad research questions.

*Figure 3*: Process for retrieval of organising themes from data



In practical terms, as the coding progressed into the second and third cycles, a framework was produced identifying the categorisation of secondary codes into basic themes as part of one of the three organising themes. ***Table 4*** shows a worked example of analysis, developing data from semi-structured interviews, via coding, and its allocation to an organising theme.

***Table 4:*** Worked examples of themes emerging from data

| **Participant** | **Example data** | **Code** | **Basic theme** | **Organising theme** |
|---|---|---|---|---|
| Charlie | "Leadership development and evaluation is entirely in the hands of an 'interested' or 'disinterested' partner. Therefore, evaluation outcomes are in the individual's gift." | Bias and contradiction | Evaluation data barriers | Implications for data |
| Gill | "Yes, on the board, if there are 2 or 3 people less invested in the long term vision, then you can get evaluation that's | Bias and contradiction | Evaluation data barriers | Implications for data |

| | | | | |
|---|---|---|---|---|
| | not strategically aligned. | | | |
| Elaine | "Also evaluation (as a coach stakeholder) tends to be for accountability of a coaching contract, or worse an out and out marketing tool." | Bias and contradiction | Evaluation data barriers | Implications for data |
| Charlie | "We work along old fashioned partnership principles - 'Know, trust and respect'. KPIs and metrics do not fit in our culture." | Cultural dimensions | "Culture" | Evaluation influencers |
| Peter | "The first thing the CEO did was send out a short email defining the company's values, and this informed our evaluation of leadership." | Leadership influence | "Culture" | Evaluation influencers |

| | | | | |
|---|---|---|---|---|
| Jimmy | "We are a cynical organisation when it comes to leadership coaching, despite the pressure we put on our core front line people to make extraordinary discretionary leadership judgements. " | Cultural dimensions | "Culture" | Evaluation influencers |

As a visual aid, this table was helpful in comparing and contrasting data, as well as alerting the research to anomalies and contradictions, assisting in the next phase of analysis: the conceptualisation of data (Easterby-Smith et al 2012). At this stage, emerging themes are connected to extant knowledge by overlaying the data analysis table onto the conceptual framework. Throughout this process, data transcripts were revisited as the direction of the research developed to seek out additional contributions to emergent key concepts, constantly linking back to extant knowledge, comparing and contrasting literature with emergent data. The final stage for this data analysis process, conclusions (Quinlan 2011), includes Stokes and Wall's (2014) stage 'writing up of the report'. This was found to be an opportunity to continue to purposefully relate the data to extant knowledge, confirming and challenging the views in literature. It was also used as a period of further reflection, to re-evaluate data, identifying and explaining anomalies and contradictions, sharpening the focus of the data analysis.

**Reliability, validity and generalisability**

Due to the philosophical stance of this research and the methods used to elicit qualitative data, this section is not only a justification for reliability, validity and generalisability considerations, but also an evaluation of the data analysis process (Silverman 2006). Furthermore, it acknowledges this form of analysis is open to scholarly criticism in terms of data collected through semi-structured interviews, and analysis reliant on professional judgement for interpretation of participants' responses. Therefore, questions of reliability, validity and generalisability are considered below.

Reliability is viewed in terms of justifying the clarity and transparency of the research procedure, to such an extent it could be imitated by other researchers to produce similar results (Maylor & Blackmon 2005; Stokes & Wall 2014). This section anticipates scholarly reservations for consistent categorisation (Hammersley 1993), interpretation of transcripts, specifically nuance within participants' responses (Clavarino et al 1995; Silverman 2006) and anecdotalism (Silverman 1989a), characterised by the generality of fragments from interviews (Bryman & Bell 2015). Firstly, it is argued the coding process for this research, including detailed preliminary codes to capture participants' responses accurately, provided reassurance of consistent categorisation. Additionally, using a version of the conceptual framework (Miles & Huberman 1984) during the semi-structured interviews facilitated a model for interrogation consistent to all applicants, while producing thick description (Geertz 1973, Lincoln & Gubba 1985), provided a basis upon which to make judgements about transferability. Secondly, the use of audio taping interviews and transcribing data to be read and re-read, as part of the process of familiarisation, is claimed to effectively filter data and lessen the chances of misinterpretation or generalisation, when making judgements about key points and conclusions. The recordings not only allowed the interviewer to be attentive to participants' responses, to pick up on language and tonal nuances during interviews, but also increase the reliability of interpretation by playing back recordings, as part of the re-evaluation of data, as the research developed. Finally, the three stage design for this research, including the logical sequence for coding, is clear, detailed and structured, easily replicable and capable of resulting in like themes and conclusions. It is claimed this research has evinced theoretical transparency (Moisander & Valtonen 2006) through a detailed explanation of its philosophical stance as the appropriate methodology to facilitate reliable interpretation of qualitative data that could be replicated if necessary.

The philosophical stance for this research accepts the role of subjectivity as a moderator for the establishment of unequivocal truths (Silverman 2101a, Stokes & Wall 2014). The methods used for this research are not sufficient in number to attempt to triangulate data for validity and, in any case, some scholars question this process as being tenuous due to the inclusion of parallel research methods (Moisander & Valtonen 2006; Stokes & Wall 2014). Rather, this research acknowledges an interpretivist methodology, by its very nature, includes data with subjective dimensions. Accordingly, decisions and choice about coding and themes were made through experience-informed subjectivity. Furthermore, as an exploratory study, it did not seek to produce a definitive answer or conclusion and welcomed the diverse and contrasting views of participants. As a basis for a strategy for validity in using semi-structured interviews, vulnerability to anecdotalism was considered and techniques including: constant comparison, internal comparison and appropriate tabulations (Silverman 2010a, Stokes & Wall 2014, Glaser & Strauss 1967, Hepburn & Potter 2004), were adopted and adapted to the process of data collection. Furthermore, prior to the semi-structured interviews, four pilot interviews were conducted to test the appropriateness of this method, as a way of producing dependable data and consider and design the techniques used in the strategy for validity. Finally, it is argued, due to the sample size for this study, and managerial positions of the participants, generalisability is limited in this research. Accepting the restricted scope of the research, it is intended findings are generalised to theory as opposed to population (Bryman & Bell 2015), promoting Mitchell's (1983) concept of the cogency of theoretical reasoning, being more decisive in achieving generalisability than statistical interpretations.

### Ethical considerations

Prior to commencing data collection, ethical approval was sought and received from the University of Chester. This research was conducted under the guiding principles contained within the Economic and Social Research Council (2012) framework for research ethics. The six principles are laid out below with an accompanying narrative as to how the criteria was be met against the corresponding key strategies used for data collection and analysis, specifically: sampling; collection and storage of data; gaining participant consent; research methodology and methods; lines of responsibility; and independence.

Firstly, to maximise benefits for individuals and society and minimise risk and harm, participants were selected from the researcher's professional network with due consideration for emotional and psychological suitability. As part of the process for sampling, explicit consent was gained from participants through an initial engagement, to explain the nature of the research and assess emotional and psychological suitability and preparedness. The risks and benefits of the research were naturally considered at regular stages during the process for data collection through the coaching principles used in conducting semi-structured interviews. Secondly, to respect the rights and dignity of individuals, the research was committed to providing confidentiality, autonomy and anonymity for participants (and organisations). All participants were asked for permission to record interviews and given verbal and written assurances (through the participant consent form). The identities and research records of the participants were kept confidential and the research undertook to redact all data and use any other means to remove personalisation. Collected data was stored securely and there was no requirement to reveal information that would identify or potentially identify participants. Guarantees of confidentiality were pledged to participants and honoured (unless there were clear and overriding reasons to do otherwise; the participants will be made aware that confidentiality does not mean legal privilege).

In ensuring individual participation in this study was bound through a written contract known as the participant consent form, outlining the obligations of both parties in line with legislative and professional codes of practice, the research fulfilled the third principle that participation was voluntary. As part of this contract, participants were provided with an 'opt out' clause which can be triggered at any time during the research process. Participants were invited to partake in the research through the participant consent form, which they were required to complete and sign prior to attending the research interview. Fourthly, research was conducted with integrity and transparency due to the strategy for research methodology and methods. The subject of the research had been carefully considered to inform an appropriate research design including methodology, methods and ethics, as well as justification for the rejection of alternative methodologies. The interpretivist methodology and methods employed to retrieve qualitative data have been taken into consideration, and emphasis has been placed on transparency, and the professional judgement and integrity of the researcher, specifically in conducting interviews and interpreting data. This documentation will be approved by the researcher's supervisory body and made available to any other bodies or individuals involved in the research.

The principle that lines of responsibility and accountability were clearly defined was also achieved through the participant consent form, where all participants were informed of the methods and intended purpose of the research. Furthermore, the consent form included the contact details of academic supervisors in the event of grievance or complaint during the research process. The research philosophy, as the guiding principle for this study, required the researcher to be especially diligent around reliability and validity; accordingly, the researcher undertook to exercise self-critical responsibility in the planning and conduct of the research. Finally, research has been undertaken at the personal expense of the researcher with no collaboration with other parties, ensuring the independence of research and negating any possible conflict of interests.

## Chapter summary and conclusion

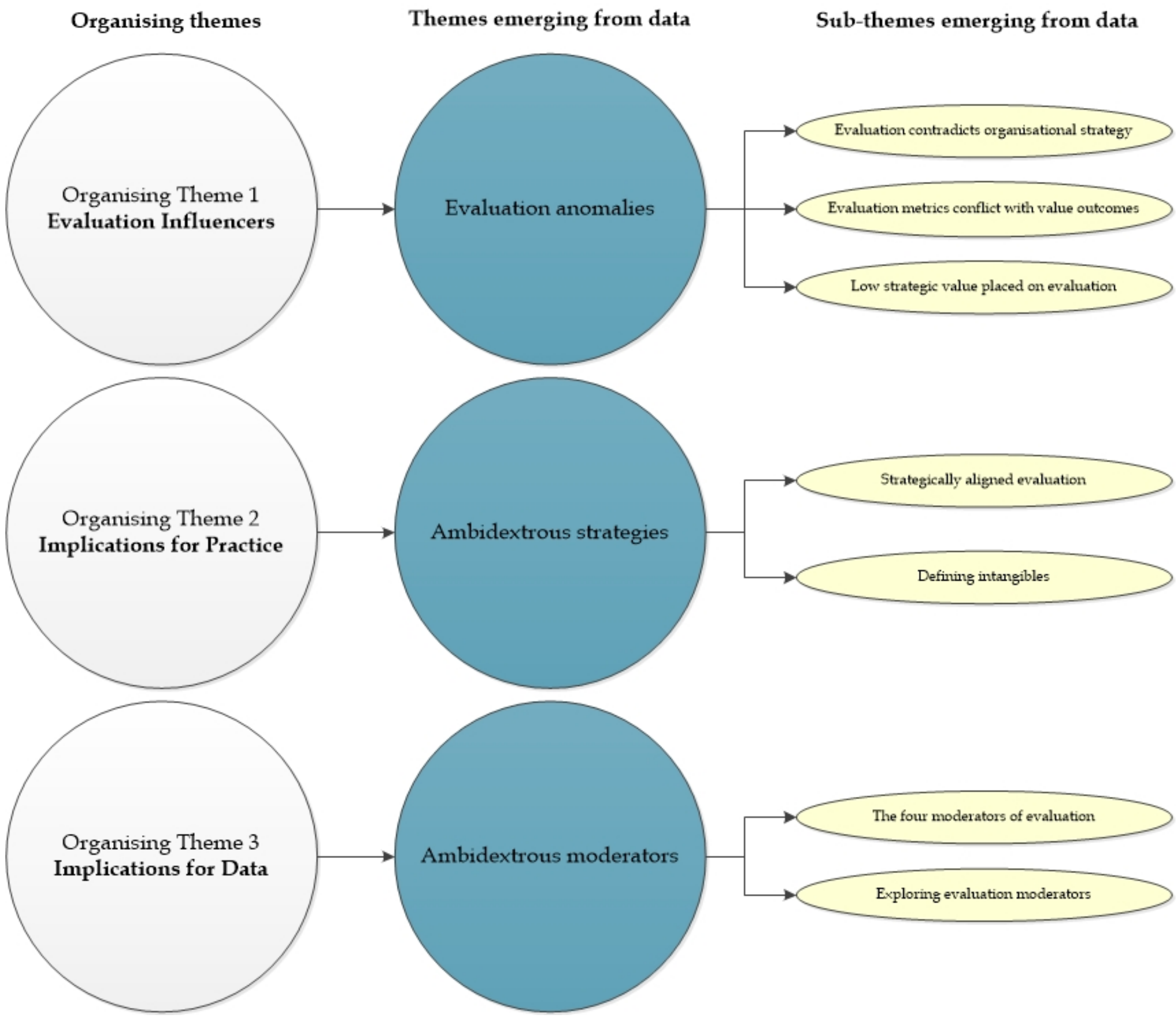
This section has set out the research methodology and methods designed for this study. It has approached the rationale for research as an examination of the process, not only as a justification for design, but to seek out potential weak spots that characterise scholastic criticism of interpretivism. In doing so, it provides a set of strategies that deliver research that can claim to be reliable and valid, while accepting limitations for its generalisability. It has described the research process in a logical sequence, building from re-stating of the problem area, connecting broad research questions to the analysis of data, via a research lens of ambidexterity. It has also been assiduous in defending the research approach using ambidexterity, specifically in the light of criticism from some scholars that this is an overused, often irrelevant approach. Having established the nature of the practice problem and the research perspective, this section presents a clear and structured ethical research model, facilitated by a unique conceptual framework and asserts that the tools used for this study are appropriate and effective, above possible alternatives, in eliciting a rich stream of qualitative data.

# Chapter 4 - Data and analysis

## Introduction

From the qualitative data collected via the semi-structured interviews, three organising themes emerged (see ***Figure 3***): evaluation influencers; implications for practice; and implications for (evaluation) data. Evaluation influencers were considered at two distinct levels (reflecting micro and macro perspectives): organisational context and emerging context. Organisational context represented the impact of internal structures including leadership hierarchies, primary goals, stakeholders and cultural dimensions. The emerging context, on the other hand, provided a macro perspective, including new leadership and coaching dimensions. The second organising theme reflected data findings for practitioners' experiences of evaluation, oriented towards problematics, and the influence of ambidexterity on existing systems, and the implications for current practice and future research and development. The implications of ambidexterity for evaluation data emerged as the third organising theme, reflecting responses around data collection and usage with a specific focus on the moderators of practice. This chapter moves to the conceptualisation stage of research by analysing data from organising themes to produce three corresponding headline themes: evaluation anomalies, ambidextrous strategies and ambidextrous moderators. ***Figure 4*** shows the conceptualisation stage as it develops from data collection and interpretation stages (see ***Figure 3***), summarising the themes and sub-themes emerging from an analysis of data from organising themes. These themes and sub-themes are explored in this chapter.

*Figure 4*: Summary of themes and sub-themes emerging from data




## Theme 1. Evaluation anomalies

A lens of ambidexterity illuminated the influence of the organisational and emerging contexts on the experiences of participants, redefining the problematic nature of evaluation through the uncovering of key anomalies. Ambidexterity revealed the complex landscape for evaluation, with participants responding by treating it as a layered and nuanced strategic context rather than a binary choice. When specifically applied to evaluation of leadership coaching, the data revealed unique experiences of ambidexterity, providing diverse definitions reflecting organisational context and primary goals (**Appendix**). Primary goals, defined as "the main business" of the organisation, shaped by both internal and external contextualisation, were found to be highly influential on evaluation. These goals fell into three main stakeholder categories: shareholders (financial performance); public (operational performance); and societal (purposive performance), reflecting data sources across distinct sectors. The different interpretations and resultant data from these sources produced a number of unique contradictions that were insightful when compared and contrasted to responses across the research sample. When questioned in terms of organisational and emerging contexts, contradictory responses were prevalent throughout research, and individual participants produced data where three key anomalous themes were uncovered: what participants said is not always what they did in practice; what was stated as being of value was not necessarily being evaluated; and although ambidextrous balance was found to be a high strategic priority, evaluation was considered as being of low strategic value. Anomalies are explored here in three sub-themes.

**Sub-theme: Evaluation contradicts organisational strategy**

Despite stated intentions to promote emerging explorative leadership outcomes and coaching dimensions, in practice, evaluation systems had not simultaneously evolved and participants continued to emphasise short term performance targets contradicting organisational strategy. Respondents across all sectors reported a key challenge was to encourage leaders to accept the emerging coaching agenda for ambidexterity, specifically in terms of explorative outcomes, or exploitative targets perceived to be in conflict with a primary goal. Here, participants thematically made strong verbal statements of intent with implications for leadership outcomes, performance management and coaching.

Jimmy, Director of People and Change at a high accountability public sector organisation reported:

> "What we are trying to achieve strategically means we need people to own that tension as a leader - between long term, building capacity, and delivering today. Despite intense pressure, you need to develop the agility and judgement to switch focus in the moment."

Alan, the CEO of a private sector real estate organisation, similarly emphasised the leadership capability to balance short term imperatives with long term goals as part of the overarching strategy:

> "Short term you always have to be responsive to markets; in other words, you have to be positioned to fulfil the job of the business - to make money for the shareholders - you have to adjust to short term circumstances but, in doing that, you have to be working to a long term creative strategy."

Sara, founder and CEO of an education charity, provides an alternative perspective, articulating the challenge in aligning exploitative targets to an explorative primary goal, in terms of leaders' motivations:

> "Our strategy is about social mobility, to give every child a chance to prosper emotionally and academically. To do this, we need to hit hard financial targets and be accountable. Sometimes the connection is a difficult one to make for our leaders, but we can't do the one without the other."

Having asserted the strategic contribution of ambidextrous leadership outcomes, participants underpinned verbal commitments with deliberate efforts to practically explain their contribution to an overarching strategy, through various internal frameworks. These frameworks were designed to identify new leadership competencies as part of a process for leadership performance management, or as a dedicated leadership transformation programme. In either capacity, these models were implicitly used by participants as signposts for leader ambidexterity awareness, making sense of coaching dimensions focused on explorative behaviours by connecting them to exploitative targets, or vice versa, in the context of primary goals.

Jimmy stressed the importance of these frameworks as arbiters of balanced leadership:

> "The Leading for Xxxxxx programme provides strategic context for what we expect from our leaders. Unless you understand balanced outcomes, you are not going to progress through the system."

The data suggested organisational structures are challenged to accommodate the emerging context and simultaneously evolve in terms of evaluation practice. The strategic frameworks that made ambidextrous outcomes relatable to leaders were reportedly undermined by their subsequent alignment to the organisational context, characterised by performance management systems emphasising a dominant primary goal or stakeholder, which continued to focus on short term performance targets. In terms of evaluation influencers, the emerging context was found to positively reorient coaching dimensions, delivering a new set of leadership behaviours, predominately explorative, despite increasing the complexity of evaluation practice by emphasising the measurement to intangible outcomes. On the other hand, the organisational context was found to be problematic, influential at an operational level, shaping the design of the ambidextrous systems organisations had in place through incongruent management systems that contrasted with the new leadership strategies they were originally set up to facilitate. Both influencers produced anomalies; however, the fundamental contradiction between leadership strategy and evaluation focus reflected the reported inability of participants to simultaneously adapt the organisational context to the strategic context.

Alice, the Director of Programmes at an educational charity described the influence of the organisational context in terms of a dominant primary goal and stakeholder:

> "Our strategy is to improve leadership in education; therefore we stress coaching for EQ; influencing and motivating; respect and humility, re-educating teachers in unconventional, informal leadership behaviours. At the same time, it's fair to say we're not focused on evaluation of the 'Lead Self' and 'Lead Others', the so-called soft coaching outcomes of the framework, but looking to measure the more formal leadership outcomes for performance targets for teachers such as progression and qualification. Those are the targets the Government are interested in, so that's what we measure."

**Sub-theme: Evaluation metrics conflict with value outcomes**

The second key anomaly emanating from the influence of organisational and emerging contexts, was that participants were not pursuing evaluation of those outcomes they stated as being valuable. Leadership coaching was perceived by participants as a key resource to deliver highly valued emerging explorative behaviours. Simultaneously, it was found participants' thinking on evaluation was not aligned to those leadership outcomes they stated as being highly prized, remaining limited to undeveloped systems, predominately emphasising performance in the context of a primary goal. Taking the conceptual framework for research as a point of reference, this study found participants, despite diverse interpretations, experienced ambidextrous balance as a valuable component in enabling the positive relationship between leadership, a dynamic workforce and high performance.

Alan, a CEO in the private sector, stated leadership expectations considered valuable in the context of overarching strategy for competitive differentiation:

> "We want our leaders to develop the ability to think laterally. We want to be great differently - offering a wide range of services. We are trying to develop a client focused business. We can't only work on short term, we are building long term relationships, we are building a brand; if you've got a constant turnover of people, clients will struggle to maintain loyalty and the belief we'll do a job better than the competition."

At the same time, verbal commitment to ambidextrous balance was contradicted, by focusing on measuring leadership coaching against exploitative targets, inextricably aligned to reward and recognition systems.

Alan, again:

> "Evaluation is linked closely to the bottom line, as part of performance management; whatever we say, financial compensation is what most of our leaders are focused on and the system recognises that."

The data revealed that a close alignment to reward and recognition systems, influenced by unique organisational contexts, meant evaluation criteria was vulnerable to being misaligned with strategy. Specifically in organisations where leaders were promoted through financial performance and had discretionary judgements, as the leadership coaching stakeholder, over evaluation outcomes and data usage. Charlie, managing partner of a general practice surveyors, accepts this as a result of the internal structure of a partnership:

> "In the way we're set up, inevitably there is a danger of bias when a partner focused on profit is making evaluation judgements."

Furthermore, the data found that, although the emerging context provided participants with a strategic platform to recognise valuable outcomes, respondents failed to connect new leadership behaviours to evaluation, where it was often limited to operational metrics. In acknowledging an inability to evaluate intangibles, Jimmy goes on to mitigate this by connecting evaluation to operational metrics of low strategic value.

> "Tangibly trying to work out the value of the impact of coaching and its contribution to a good leader; well, I don't know how we start to put a financial value on that. What we do look at is the cost of turnover and recruitment, absence and sickness, in terms of overtime and rest days."

Participants were found to have gone to considerable lengths to emphasise the value of emergent explorative leadership behavioural development. Leaders were encouraged to accept an agenda for ambidexterity, through operating models, transformational leadership programmes and leadership competency taxonomies, to explain the relevance of both exploitative and explorative outcomes, by placing their contribution in the context of a primary goal. However, evaluation of coaching was found to contradict these efforts, being one dimensional, focused on exploitative outcomes emphasising performance against a primary goal to inform reward and recognition systems, or limited to traditional operational targets. Throughout the data, it is thematic that the organisational context, specifically participants' use of reward and recognition systems and performance management structures, to advocate the value of the ambidextrous outcomes, is found to have the reverse effect, undermining explorative outcome evaluation by focusing on either financial self-interest or easily measurable targets for accountability.

Jimmy articulated the misalignment between strategic outcomes and operational metrics:

> "No, I can't explain the gap. We are committed to a new way of leading. For instance, we know financial performance is underpinned by succession and we can connect that to retention of our leadership talent. In turn, we make it quite clear that this is a vital part of our leadership strategy but, still, we are only really comfortable with applying evaluation data to operational metrics that tell us very little about the wider picture."

**Sub-theme: Low strategic value placed on evaluation**

Although participants reported the strategic value of ambidexterity as an operating environment for creative leadership to make judgements connecting exploitative and explorative outcomes, the influence of organisational contexts meant this did not extend to evaluation. In broad terms, the data showed that participants prioritised ambidexterity as a strategy to deliver primary goals, in highly competitive circumstances, using coaching to develop leadership behaviours to produce creative and innovative strategies around subordinate outcomes. Thematically, data revealed participants considered ambidexterity at two levels: a) primary goals and b) subordinate strategies. Primary goals have been classified in this research as the single (or dominant) overarching goal for the organisation in terms of performance, while subordinate strategies are defined as the day-to-day targets set out to achieve the primary goal. The data showed participants building chains across the conceptual framework, (with varying degrees of formality) connecting exploitative and explorative outcomes, rejecting the claimed binary nature of ambidexterity, for subordinate strategies. The data revealed subordinate strategies were diverse, ranging from mergers and acquisitions to recruitment and retention of top talent, while sector strategic chains were found to be distinct, emphasising either explorative outcomes (private), or exploitative targets (public and third). This approach was also found to be used as a way to mediate between leadership cohorts to encourage the adoption of emerging behaviours, by providing evidence of commercial or purposeful legitimacy for explorative outcomes.

Having established the high strategic priority place upon ambidexterity, data revealed evaluation, in contrast, to be strategically unambitious. A line of questioning about evaluation data usage produced responses that reflected the low strategic value of evaluation. The data fell into four categories: reward and recognition; programme maintenance; operational; and strategic, and produced clear, and arguably predictable, distinctions between private, and public and third sector usage. Specifically, whereas the category for reward and recognition was the significant focus for private sector participants, public and third sectors were predominately focused on operational targets. Although reward and recognition primarily focused on leader's compensation, participants also mentioned promotion and inclusion in the leadership hierarchy (via distinct leadership coaching programmes). All private sector participants (7) stated evaluation data, assessed against financial performance, informed remuneration packages. This contrasted with data from the public and third sectors, where no participants reported this as a destination. Entry to the organisational leadership hierarchy was also mentioned by four participants from the private sector, a classification also unacknowledged by other sectors. Where data did overlap in this category was with reference to assessment of leadership career progression and promotion. In this classification, all respondents from the private and public sector reported this as a destination for evaluation data, but again this was not recognised in third sector responses.

The category of programme maintenance was universally recognised in the data. Within this domain, future coaching design was mentioned by all participants. Chrissy, an HR director for a global energy company, described this in practice:

> "We are evaluating coaching impact and that is informing future development requirements in a sort of evaluation loop."

Only one participant specifically reported programme cost accountability or future investment in programmes as a destination for evaluation data. In making this point, Jimmy emphasised not only the significant investment, but the influence of the organisational context, characterised by the high levels of accountability expected from the public sector:

> "Why do we have a full evaluation strategy for this programme? Because it cost £x million and at some point, I'm going to have to go back to xxxxx to show that it was a good investment."

Similarly, Owen reported accountability in the context of a charity:

> "I think we have to evaluate because it is a cost and we are a charity. Somebody else is paying for our service, whether that's a local authority or a donor, and we have to be able to justify every penny we spend that doesn't directly relate to youth homelessness."

The influence of organisational context saw reward and recognition as the dominating focus for all private sector participants. In contrast, public and third sector organisations were all focused on operational evaluation criteria, shaped by primary goals for financial accountability and operational performance. In terms of operational performance, specifically in public sector organisations, evaluation was found to be limited to exploitative leadership targets, such as scalability, financial risk, and recruitment and retention, or interpreted as HR targets, despite acknowledgement of a desire for a more strategically expansive scope for evaluation, as stated by Jimmy:

> “Evaluation is focused on the here and now, which from a leadership perspective is about operational performance outcomes. This is the main outcome measure for which they [leaders] are held to account. They are also held to account for the critical frontline measures on people: sickness, retention and all the normal stuff - but none of that deals with the causes of any kinds of issues, which is where we think a longer term measure of engagement would be a much more meaningful indicator.”

In the private sector, evaluation data informed operational outcomes in two cases where the evaluation stakeholder was found in the HR function.

Strategic motives for evaluation, however, were found to be minimal, reportedly confined to informing talent gaps in the private sector (2) or wider (societal) impact in the third sector (1). Diversity and communication targets were not included as strategic categories because of the context stated by participants, either to fulfil a quota (1 public sector), or as part of a “wish list” for future organisational transformation (2 private & 1 public sector), therefore considered operational. Wider strategic evaluation was mentioned by only three participants (1 public & 2 third sector), and in no instance was a system or metrics in place to evaluate. Alice expressed this in terms of the dominant influence of the organisational context, specifically the leadership coaching and evaluation stakeholder:

> “It is important to distinguish between short and long term impact for evaluation. In a way, the short term data merely represent levels of demand. We are keen to look at the longer term social implications as the real area of impact. The Government gives us grants to deliver on targets so that’s our evaluation focus; they don’t see the value in the long term impact so it gets overlooked.”

Where evaluation data for leadership coaching, to inform wider organisational strategy, had been successfully collected (from a participating coaching consultancy), dissemination, implying the low strategic value in which it was held by organisational sponsors, was found to hinder usage. Although this was evidenced in only one case, Elaine, from the perspective of a coaching consultancy, suggested this was commonplace:

> "We collect themes as an evaluation metric; our coaches are in a very privileged position to pick up evaluation data to inform change for the organisation. We have 10 years' worth of valuable data we think would be useful to the organisation to make change - for example, you are not going to retain female leaders unless you adopt flexible working - and I feel this just disappears into the ether and yet we have faithfully captured these insights as part of our evaluation of impact. We are not able to impact organisations with our evaluation data: where the pressure points are etcetera, because our clients [HRDs] are reluctant to pass it on or act for either operational or legal reasons…HRDs are generally timid about reporting to the board."

Further evidence of participants' attitude towards evaluation as being of low strategic value was found in a lack of intentionality, where impact was not reported to be measured at all and was assumed or incidental. In some cases participants expressed an implicit expectation for evaluation. Peter, despite his position as a CFO in a highly competitive global entertainments organisation, encapsulated this point:

> "It's very hard to evaluate coaching impact, because without coaching we would undoubtedly accomplish a lot; we just believe that with the openness and focus coaching brings, we will accomplish more."

Similarly Gill, head of talent programmes in a private sector organisation, concurred:

> "We just knew that if we hadn't invested, the cost to the business would have been significant - we didn't go beyond that knowledge."

Therefore, despite adapting to the emerging context, participants experience of evaluation was limited and strategically confined by the influence of the organisational context, producing an anomalous and contradictory environment for evaluation practice, where the realities of short term accountability to a primary goal was found to be the dominant influence on practitioners attitudes. Expressed in terms of organisational tension, by Jimmy:

> "There is too much competition for the time and the capacity of our leadership resource and you have to fight to keep the light shone on this area."

### Theme 2. Ambidextrous strategies

Representative of the emerging context, the research found ambidexterity provided a structure for leadership outcomes; however, despite data that suggested these addressed stated problematics (in both literature and practice), participants did not consider extending these models to include evaluation. This study examined data for existing ambidextrous frameworks, their potential impact on problematics and the implications for current and future evaluation systems. These models were found to be either operational or conceptual and defined in this study as balance mechanisms. Operational balance mechanisms were discovered to be explicitly designed to assist leaders to make decisions, chain-building value across ambidextrous outcomes to achieve specific targets (including transformational leadership programmes and operating models) in pursuit of a primary goal. These were distinct from conceptual balance mechanisms which were found to be implicit, centred around frameworks for leadership competencies, values and behaviours, to legitimise, or make sense of, ambidextrous dimensions of leadership in the context of a primary goal. Despite serving to clarify emerging leadership outcomes, intentionally aligning them to performance management systems, and implicit reference to leadership coaching dimensions, all models stopped short of including evaluation. This theme explores the implications of ambidextrous strategies in the anomalous and problematic environment of evaluation, specifically focused on strategic alignment and intangible outcomes.

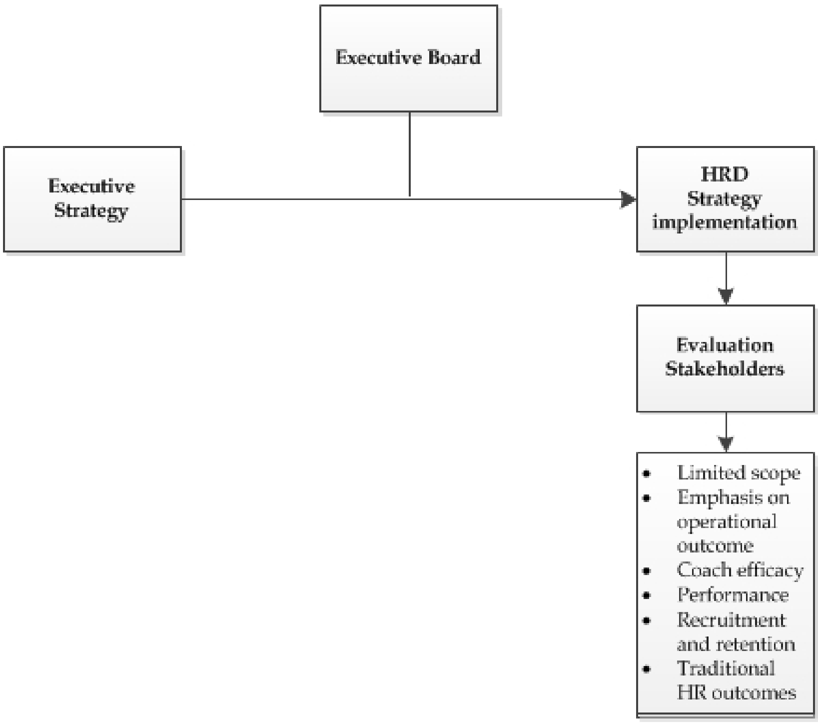
### Sub-theme: Strategically aligned evaluation

Strategic alignment is identified in this context as the ability to connect ambidextrous frameworks to evaluation. Ambidextrous balance mechanisms were in place in all participating organisations and included multiple versions of leadership competency frameworks, transformational leadership programmes and single operating models. All iterations reflected participants' strategies to keep pace with emerging context and shifting attitudes to accommodate the next generation of leaders. The reported significance of these mechanisms was to encourage change by legitimising and explaining, either exploitative or explorative, seemingly incompatible strategies, as a way of achieving primary goals. For instance, a participant in an organisation where financial performance for profit was the primary goal, reported an operational balance mechanisms focused on a dominant subordinate strategy for competitive differentiation. In practical terms, this meant a framework designed to make sense of intangible leadership outcomes by placing them in the context of a tangible destination. However, the data revealed, despite continuing to assert strategic alignment, specifically outcome impact isolation and measurement of intangibles, problematic and limiting, the participant did not consider connecting these frameworks to evaluation. As expressed by Peter:

> "I think it's hard to evaluate the explicit benefits of leadership coaching per se and separate those out from all the other factors in a way that you could assess return on investment. Tangibly trying to work out what a good leader looks like, what is a good coaching outcome, I don't know how we put an evaluation metric on that."

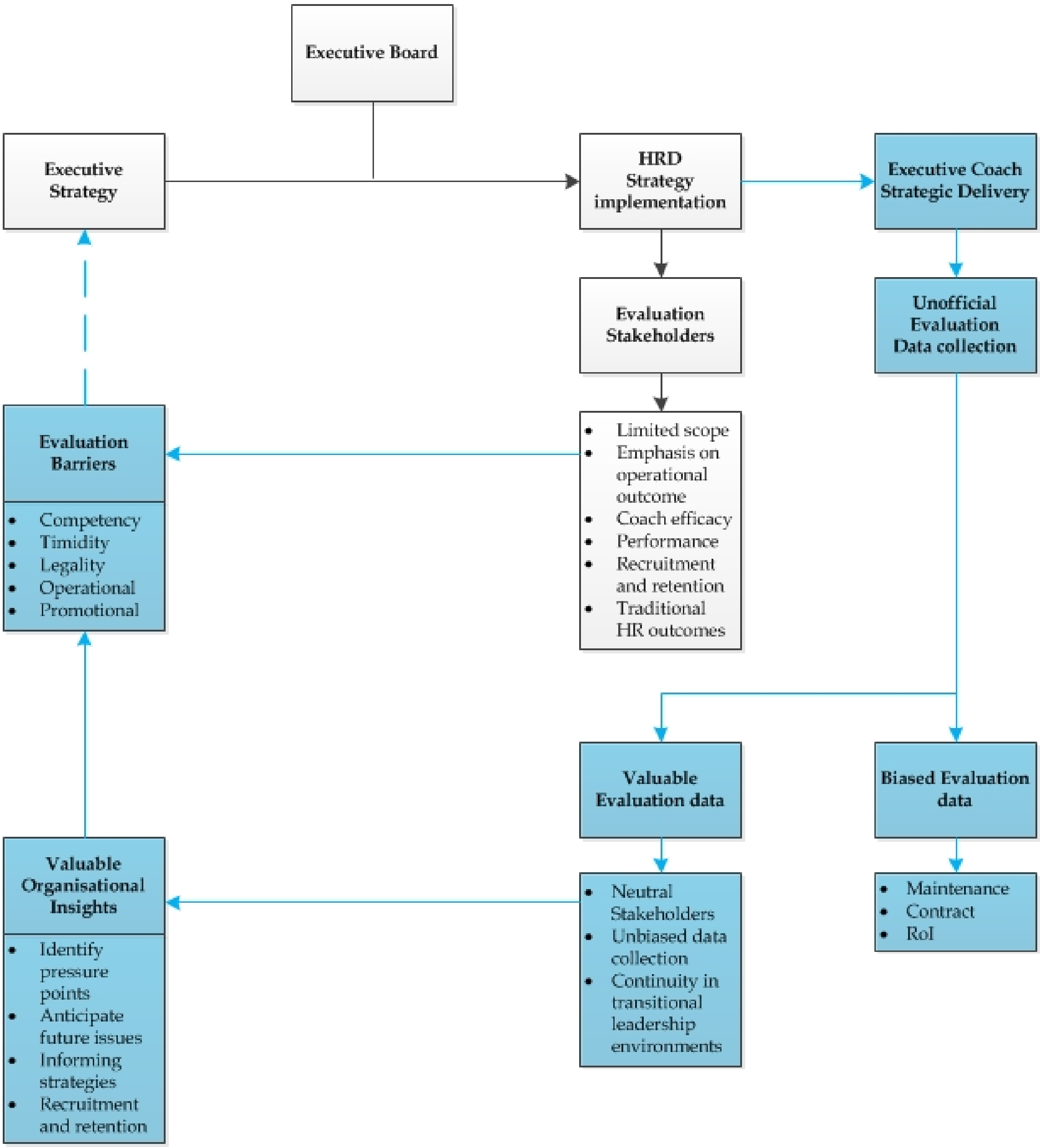
Having established the strategic value participants placed on ambidexterity, and the usefulness of ambidextrous frameworks in providing a taxonomy of exploitative and explorative leadership outcomes, participants were questioned on how, if at all, these applied to evaluation. The data showed, despite the fact ambidextrous frameworks were designed to form part of the internal performance management process, participants generally failed to implement an integrated system, combining multiple models which they then did not connect to evaluation. Although ambidextrous models were reported to have positive implications for strategic alignment, failure to integrate frameworks was problematic and limiting for evaluation. In practice, this was illustrated in the example shown in ***Figure 5***, of a private sector real estate company. Here, despite the opportunities presented by ambidexterity to influence evaluation by delivering strategic alignment, simultaneously identifying the contribution of intangible outcomes, the organisational context, specifically HRD as the evaluation stakeholder, limited evaluation to operational outcomes, coaching advocacy and HR performance targets for recruitment and retention (as a subordinate strategy).

***Figure** 5*: An operational approach to evaluation influenced by the organisational context




The limitations in this example are exacerbated by subsequent data emerging from the coaching provider (as a legitimate participant in this research). ***Figure 6*** uses the new data (from the coaching provider) to re-imagine a collaborative integrated evaluation approach (overlaid in blue), providing an alternative evaluation perspective, illustrating the missed opportunities for strategic alignment of non-integrated evaluation. The example shows the limitations of a non-strategic evaluation stakeholder with a restricted view of ambidexterity across the conceptual framework, focused predominately on operational targets, rejecting evaluation data from an external provider.

***Figure 6*:** Non-collaborative evaluation highlighted by organisational ambidexterity: a missed opportunity for strategic insight




Despite the enthusiasm for the collection of evaluation data as a rich source of strategic insights for the client, the organisational context treats evaluation as operational and with low strategic value. The coaching consultancy goes as far as distinguishing tendentious data to be ignored, highlighting valuable evaluation data; however, Gill reports being frustrated by the evaluation stakeholder (HRD):

> "Our evaluation data has little impact because our clients are reluctant to pass on tough messages, and don't see what business is it of ours anyway."

The data did reveal positive implications for evaluation of ambidextrous frameworks successfully connected and strategically aligned, generally found in organisations where the primary goal was not financial performance for profit. In the experience of participants in public and third sectors, focused on purposive, operational or financial performance for accountability, operational balance mechanisms were found to have a wider scope, either building purpose for daily tasks and exploitative targets, or as part of a programme for operational leadership transition. The main challenge for these participating organisations was to motivate leaders to deliver exploitative targets, not congruent with their values or work drivers, as articulated by Owen:

> "People do not join us for the money. They've come here because they want to do something good for someone else - and get paid something."

This charity reported it was in the process of introducing a single operating model as a way to connect exploitative targets, seen as incompatible with the motives of employees, to explorative outcomes, by creating a route for every job into the primary goal. This model is fundamentally designed to achieve a culture of collective understanding, not just in a sense of removing departmental budgetary justifications, but as a way of enabling leaders to get employees to think about their roles in relation to the overarching organisational purpose. In doing so, it intentionally sets out to deliver strategic balance, building chains between short term and long term outcomes by placing exploitative performance targets in the context of the wider strategic exploratory primary outcome. Owen explained:

> "Purpose can be so easily divorced from what people are doing. I believe the way we reconcile those two things is to put purpose at the heart of people's roles and in that way, we will deliver a balanced strategy."

It was found that where financial interests were not the dominant concern, the relationship between ambidextrous balance and evaluation was potentially helpful, providing focal points for the impact of leadership coaching. Owen again:

> "We are monitoring leadership outcomes through destination, so we can see where our young people are going when they leave us, and we're monitoring their status when they leave: are they in employment; are they in training; education; are they not doing anything? We can see all of that, and we're measuring it."

The operating model provides a unique ambidextrous framework for the organisation. When applied to evaluation, it serves to break down an intangible explorative goal into ambidextrous targets to produce metrics for measuring impact on leadership performance, providing valuable data on leadership behaviours. Owen summarised:

> "My view is that it's very easy to measure data; it's less easy to measure behavioural change, and so I'm positioning behavioural change as the foundation on which you might get data on performance change. Therefore, it is critical that we have data to make judgements on an overall view of whether our leadership behaviours are getting better. So, we are not looking for RoI but Behavioural RoI, expressed in better outcomes for our young people."

It should be noted this was reported as an intention and no formal evaluation system along these lines was in place. However, as with all other participants, transitional models and frameworks designed around ambidextrous balance were found conceptually interesting by practitioners when hypothetically discussed as potential future models for evaluation.

### Sub-theme: Defining intangibles

The definition of intangibles has been reported as a persistent problem area for evaluation. In terms of ambidexterity as a context for this study, intangibles are classified as explorative outcomes and tangibles as exploitative. The data showed leadership competency frameworks effectively defined ambidextrous outcomes, demystifying explorative behaviours by placing them in the context of their contribution towards a primary goal. However, it was also found, practical definitions of intangible outcomes were not extended to evaluation metrics, or used to develop evaluation data collection methods. Leadership competency frameworks, characterised in this research as conceptual balance mechanisms, were aligned to the organisation's values and primary goals. All participating organisations reported using at least one leadership framework, with differing motives, primarily designed to develop and assess leadership competency. Despite explicit reference to leadership performance and development, it was thematic that frameworks were implicitly used to link tangible and intangible leadership outcomes, through a taxonomy of explorative leadership behaviours. This method of classification was found to provide definition to explorative leadership outcomes by connecting them to commerciality or purpose, underpinning their value and legitimising them as components in systems for performance management. Participants reported categories such as: Good citizen, Custodian, Trusted partner, Value added, and Servant-hearted, as designations for explorative outcomes as part of the process of legitimisation and to provide focal points for assessment. They were also found to provide a strategic explanation for leaders by placing outcomes in an operational context and, in doing so, going some way to demystifying the idiosyncratic nature of leadership coaching, commonly described by scholars as a barrier to evaluation.

Despite the existence of such frameworks, formalising intangibles and making them relatable, participants in all private sector organisations reported evaluation approaches and metrics that were discretionary, informal and anecdotal. Furthermore, these were reliant on inconsistent judgements and prone to self-serving interpretation, specifically where leaders were influenced by reward and recognition systems inextricably aligned to evaluation via performance against a primary goal. Charlie, a managing partner, described the implication of this in a partnership:

> "Leadership coaching evaluation is entirely in the hands of the departmental partner, who has complete discretion as to his judgement, which is generally aligned to his own perceptions of what counts, or what is readily understood in financial terms."

However, participants from public and third sector organisations reported good intentions for evaluation built around ambidextrous frameworks, and a positive relationship between intangible and tangible outcomes, as described by Owen:

> "'Bricks and mortar' outcomes should be aligned to the leadership value framework. Our leaders' development is evaluated on how well they live the values to deliver hard tangible targets."

One public sector organisation reported a deliberate attempt to introduce engagement or value scores as part of a structured approach to evaluation metrics. However, data collection was found to be limited to the equivalent of Kirkpatrick's taxonomy, levels 1 (reaction), 2 (learning) and 3 (behaviour), and collected anecdotally. In this case, the limitations of data collection overrode the identification of intangibles, as the source of the barriers for causality and the misalignment of evaluation data. Jimmy explained the concept:

> "Engagement scores are self and peer reporting: how are people feeling about their leaders? Do they feel able to speak up or challenge? Scores are aggregated up through the organisation and focused on areas of improvement that, you could say, provides the data for coaching impact. We can then ask questions of our leaders based on these scores: 'Your engagements scores are 10% below the xxxx norm, why is that?' This is where we have to make evaluation judgements, between long term engagement and short term delivery."

He then referred to the implications of data collection limitations:

> "At this [leadership] level you can't single out the impact from coaching on goals because we rely on self-reporting or 360˚s to inform engagement scores. We are working on this but, with the data we get, all we can do is apply this to broad operational improvements: are we seeing more inclusivity (diversity) in teams? Fewer grievances around discrimination? Improved misconduct figures? But these outcomes do not serve the real purpose of the programme: the transformation of our leadership cohort."

Contradictorily, the data thematically described existing frameworks facilitating isolation of outcomes and definition of explorative behaviours, the same areas participants persistently report as evaluation problematics. Therefore, a more fundamental problem than data collection limitations, was the failure to connect frameworks negating problematics, to evaluation. Half of respondents (across sectors) stated, effective evaluation of leadership coaching impact was desirable. All of these respondents had in place ambidextrous frameworks, which made the absence of an effective evaluation system all the more perplexing. The example in ***Table 5*** illustrates data from a private sector organisation, with reference to the research conceptual framework (see ***Table 1***), and the logical sequence connecting valued leadership expectations, emphasising explorative/intangible behaviours; ambidextrous chain building for subordinate strategies; emergent coaching dimensions; and the implications for evaluation.

***Table 5:*** Leadership competency framework for conceptual balance mechanism, connecting ambidextrous outcomes strategically, for primary goals for (financial) performance, introducing dimensions for coaching and evaluation

| **Organisational leadership competency criteria** | **Exploitative connecting outcomes** | **Explorative connecting outcomes** | **Emerging coaching dimensions from ambidextrous subordinate strategies for primary goals** | **Implications for evaluation outcome focus from ambidextrous subordinate strategies for primary goals (in terms of reported data)** |
|---|---|---|---|---|
| **Trusted partner**<br>• Develops talent pools for succession<br>• Mentoring<br>• Invests in talent<br>• Champions organisation (advocacy) | • Allocation of resources to areas of high impact | • Talent management for pivotal roles<br>• Wellbeing and engagement<br>• Fuller range of coaching outcomes<br>• Culture of collective understanding | • Managing multiple conflicting structures and systems for high impact<br>• Social integration and relationship management for retention | "We're not replete with talent; therefore we have to work to develop it, to achieve our goals."<br><br>"Our main focus is on top talent for both creating opportunities and high impact roles." |

| | | | | |
|---|---|---|---|---|
| | | | and succession | |
| **Effective communicator**<br>• Leads from the front: visible and accessible | • Responds in a complex environment | • Fuller range of coaching outcomes | • Managing (respond) change in a complex environment | Spans and layers' model: "How well we communicate up and down the line, so we don't have managers managing managers." |
| **Strategic thinker**<br>• Modifies strategy according to business trends<br>• Designs an agile organisation responsive to clients<br>• Maps bold steps to grow organisation<br>• Visionary | • Responds in a complex environment | • Opportunity generation<br>• Future competitive relevance<br>• Innovative and creative | • Managing (respond and anticipate) change in a complex environment<br>• Managing risk for future competitive relevance | Spans and layers' model: "Taking costs out to increase effectiveness." |

| | | | | |
|---|---|---|---|---|
| **Problem solver**<br>• Domain expertise<br>• Reassures others to use unproven problem solving approaches<br>• Selects solutions for the greater good of the enterprise over parochial interest | • Training | • Coaching<br>• Culture of collective understanding | • Managing professional judgement for development needs<br>• Managing strategic alignment for allocation of resources | "Technical skill sets are definitely changing, we are aware that we constantly need new competencies for the emerging workplace, not just to keep up, but to get ahead." |
| **Change agent**<br>• Inspires others to constructively challenge the status quo taking well-calculated risks<br>• Creates a culture where mistakes are an opportunity to learn | • Performance | • Leadership<br>• Opportunity generation | • Managing social integration and relationships to manage risk and change for opportunity generation and future competitive relevance | "Re-imagining initiative' for transformational leadership to retain talent."<br><br>"High potential' programmes to develop coaching behaviours for leaders." |

This case shows, although the organisation has in place a structured approach to demystify intangible leadership criteria, isolating their contribution to a primary goal, the failure to connect to evaluation means that this area remains problematic and contradictory, despite the positive implications of the extant framework. The logic of expanding this framework is recognised by Peter, the organisation's CFO:

> “Yes, it’s fair to say, amongst other things, this represents an evaluation tool, albeit, we don’t have one. We would look to this framework to inform coaching outcomes, I suppose evaluation is just not considered part of the coaching package.”

**Theme 3. Ambidextrous moderators**

This final section emerges from participant responses focused on evaluation data, specifically, collection, usage and barriers. It uncovers moderators of evaluation emerging from participants’ experiences of ambidexterity, facilitating a deeper understanding of barriers and their causes and, in doing so, begins to address the third broad research question about the potential usefulness of ambidextrous frameworks to evaluation practice. The data revealed evaluation was universally treated as low priority, defined as either a formal system (5), limited both operationally and strategically, or an informal (7) process, confined to anecdotal evidence and discretionary interpretation. When questioned, organisations reported either a lack of interest in evaluation, due to one or a combination of factors including: size (4); internal context (3) or cultural dimensions (6). When specifically discussing barriers as moderators to evaluation data, it was found organisations were: confused on ownership and responsibility for evaluation (4); limited to evaluating between Kirkpatrick’s levels 1 to 3 (reaction, learning and behaviours) (12); considered evaluation too complex due to timelines, isolation and monetisation of intangible outcomes (8); and lacked confidence in the competency and judgement of those evaluating (3). Therefore, although the research found all participants recognised the positive relationship between ambidextrous leadership and high performance, at the same time evaluation thinking remained undeveloped as a potential source of new valuable data for the wider strategic insights. Accordingly, this section explores the research data for the influence of ambidexterity in the design of moderators, their implications for evaluation systems development and data usage, and whether an expanded scope for extant ambidextrous frameworks to include evaluation would be useful to practitioners.

### Sub-theme: The four moderators of evaluation

As part of the investigation into anomalies, evaluation procedures, specifically in terms of data collection and data usage, were examined in the context of reported influencers and moderators, to explore beyond the scholarly references to barriers. It was found organisations adopted three distinct approaches to evaluation: operational, strategic and multiple stakeholders. These categories recognised the organisational evaluation stakeholder: HR (operational) and executive (strategic), while multiple stakeholder approaches are defined in terms of the collaborative (or non-collaborative) relationship between different sponsors or internal evaluation stakeholders. Each was found to have a different interpretation of ambidexterity with varying implications for evaluation (examined later in this section). Within these approaches the data produced four key influencing moderators (see ***Table 6***): primary goals (as an evaluation influencer); evaluation status (referring to formal or informal approaches); a multi-generational leadership pool (recognising the challenges of a natural generational shift in the workplace); and organisational context (the evaluation "culture" of the organisation, including attitudes, accountability and implications of those responsible for evaluation judgements). These moderators are distinct from the evaluation influencers in the organising theme, which set out to provide a basis for the state of practice, as they seek to develop data at a higher level to explore the opportunities presented through a lens of ambidexterity.

***Table 6:*** The four moderators of ambidextrous leadership coaching evaluation: dimensions and implications

| **Moderators of evaluation (Emerging from data and categorised by this research)** | **Moderator dimensions (Emerging from data)** | **Example data: Reported implications and barriers to evaluation** |
|---|---|---|
| Primary goals | Financial performance (profit)<br>• Focus on financial self-interest<br>• Elevation of exploitative outcome leaders | • Resistance to evaluation of explorative outcomes<br>• Biased judgments towards exploitative outcomes |
| | Financial performance (account)<br>• Focus on short term imperatives | • External context<br>• Leadership development timelines |
| | Operational performance<br>• High levels of accountability | • Events and incidents |
| | Purposive performance<br>• Employee motivation and engagement<br>• Positive recognition of measurable subordinate strategic outcomes | • Intangible outcomes<br>• Collective understanding |
| Evaluation status | Evaluation stakeholder: Executive or HR | • Misaligned outcomes |
| | Formal:<br>• As part of a reward and recognition system<br>• As part of a performance management system | • Inconsistent judgments across internal departments<br>• Strategic disconnect between HR and the Executive |
| | Informal: | • Coaching efficacy |

| | | |
|---|---|---|
| | • Lack of accountability<br>• Data collection limited to Kirkpatrick levels 1 & 2 | • Limited anecdotal data<br>• Limitations of discretionary evaluation |
| Multigenerational leadership pools | • Flawed succession strategy<br>• Emerging leadership behaviours and values<br>• Conflicting expectations | • Unreliable data<br>• Leadership transition<br>• Timelines and opportunities |
| Organisational context | • 'Disinterested' evaluation stakeholders<br>• Leadership coaching stakeholder<br>• "Cultural' fit for evaluation | • Inconsistent data from discretionary sources<br>• Competency and dissemination<br>• Non-progressive approach to evaluation |

Responding to anomalies from participants' responses, this study applied moderators emerging from data to an investigation of current evaluation practices, at three stages: data collection, data usage, and evaluation data barriers. Accordingly an analysis of the data, from the experiences of participating practitioners produced valuable insights into the influence of ambidexterity on evaluation, described in this research in terms of four moderators.

*Primary goals*

As a moderator for evaluation, the data revealed primary goals had a significant influence. Despite this study's finding ambidexterity was not a binary concept but an advantageous layered, complex collaboration of exploitative and explorative outcomes towards an overarching target, primary goals were found to elicit a one dimensional approach to evaluation. Primary goals, variously reported by participants as the driver for leadership coaching and evaluation, were found to be the dominant influence on evaluation metrics, often overriding and contradicting the stated outcome emphasis of respondents. For instance, in cases where the primary goal was a specific target measurable by quantitative metrics (for example, teaching or classroom statistics), no attempt was made by the participating practitioner to go beyond the required (by the sponsor) limited exploitative evaluation criteria, despite emphasising the important contribution of explorative leadership behaviours when questioned. Alice articulated the implications of a dominating primary goal and external evaluation stakeholder in evaluation practice:

> "Leadership development is our key focus in our mission to equalise education through impact in the classroom. However, our success is only measured through quantifiable xxxx targets which are of interest to our sponsor."

Similarly, where the primary goal was financial performance for profit, results were found to be evaluated quantitatively, despite evidence of the contribution of explorative outcomes. Alan said:

> "Yes, we want creative leadership but, inevitably, bottom line financial performance is what counts, and what our leaders get measured against."

All data from private sector participants reported primary goals for organisational profit, inextricably linked to individual financial interest. This was found to create a difficult environment for evaluation, with data vulnerable to bias, inconsistency and contradiction. In two participating public sector organisations where there were high accountability operational primary goals, expansive evaluation beyond short term imperatives was reported as 'a luxury' afforded by high performance (assessed against short term exploitative targets, shaped by a primary goal), allowing space to consider the contribution of subordinate strategies through chain-building ambidextrous outcomes. Jimmy explained this tension in the context of high operational accountability:

> "We have to make time for the long term and are only really comfortable doing that when we have dealt with the short term. All that means is we have to be deliberate when thinking about the long term. The impact of incidents and the need to respond to a change of direction in a highly focused leadership environment is inevitably where we focus evaluation of leader development."

In cases where purposive performance was the primary goal (all third sector), there was recognition of the problematic nature of evaluating intangible long term outcomes and focus was found to be turned inwards on more measurable exploitative targets such as financial accountability and management of resources.

*Evaluation status*

The data revealed evaluation status, shaped by the evaluation stakeholder and individual interpretations of ambidexterity, was a significant source of misaligned outcomes. The tension between the executive and the HR function, bringing strategic or operational evaluation perspectives, was made more complex by the adoption of either a formal or informal approach. Formal status was characterised by being closely aligned to the primary goal, primary goal stakeholder, or internal processes for transformational leadership. At the same time, strategic alignment was compromised by being inextricably linked to reward and recognition. In all cases (6) where evaluation status was formal, the approach was operational, as either part of the HR function or through various leadership assessment systems, for example: Objectives by Key Results, 5 Leadership Competency Framework or 6 Values Model. This resulted in strategic outcomes being either interpreted as operational, or emphasising the exploitative targets in the ambidextrous chain, forming a subordinate strategy. For instance, despite explorative coaching dimensions to deliver competitive differentiation through creative and innovative leadership, as part of a strategy for a primary goal for profit, the participating CEO reported coaching impact was evaluated on leadership responsiveness, recruitment and retention, and financial risk:

> "Our evaluation structure doesn't have the range to go beyond targets that are not easily financially recognised."

Furthermore, the focus on financial self-interest through performance management systems, integrated as part of the evaluation process, facilitated a further layer of tension between contrasting evaluation stakeholders, resulting in inconsistent judgements. Alan discusses this in terms of the incongruence of internal leadership promotion criteria and emerging leadership outcomes for evaluation, connected by performance management systems:

> "Leadership gets paid for what it does, but top brokers get paid more. Those we promote to leadership roles because they are champion brokers are not suited to making evaluation judgements outside the realm of financial performance."

Similarly, Charlie reports this incongruence from an alternative perspective suggesting strategic accommodation:

"Some equity partners are focused entirely on short term financial performance and others are interested in long term development and cultural growth of the business. We accept the two because you need a balance."

Where evaluation was described as informal (6), participants provided justifications, referencing organisational context (in the sense of influencer) in terms of size or governance. In the context of governance, Ed, a director at a higher education organisation, stated:

> "This is a transitional issue, we are only 18 months into this programme and further developments are expected in this area."

Alternatively, Daisy , an HR director in the private sector, referenced size as being influential:

> "We are small enough for departmental heads to have a strong handle on how our leaders are developing…if we were CBRE or Savills that wouldn't be the case."

The data suggested informal evaluation status also reflected participants' attitudes to evaluation as a process of low strategic value, specifically where evaluation was implicit, as described by Daisy:

> "We knew coaching added value, and we would only ever question how much value if the overall financial performance dipped."

*Multigenerational leadership pools*

Generational moderators were reported as multifaceted. Using the conceptual framework as a reference point, participants stated four ambidextrous generational challenges (shared by all) shaping approaches to leadership coaching and its evaluation: Succession; retention of leadership talent; values and behaviours of emerging leadership cohorts; and coaching perspectives and expectations. When questioned, four participants (3 private and 1 third sector) reported succession as a priority. Charlie suggested this was also a part of a wider retention strategy:

> "We must encourage the generation below to see there is a career path for them to follow, making sure we make room for them to be able to grow the business in the long term."

At the same time, the data revealed, one of the most significant leadership challenges participants faced was the perceived vacuum beneath the incumbent executive, as a result of flawed succession strategy and retention. Three participants made various reference to the generational 'character' of a leadership group that found it difficult to hand over to the next generation, despite stated intentions. Daisy, typically represented this point of view and expanded to include implications for evaluation data:

> " As a generation we are not good at reaching down to the next level to provide opportunities to facilitate succession. Results from our evaluation data of coaching impact, it should be assumed, are vulnerable to distortion. A poor response was not necessarily down to the programme but in some cases the flawed character of leaders who find it difficult to promote."

At the other end of the succession continuum, 5 participants (across all sectors) emphasised the need to develop leadership talent to build capacity and retain high potentials. Here, participants reported 'cultural' differences between generations, over expectations for advancement, organisational values and investments in career development. Evidence participants acknowledged and accommodated, albeit at an operational level, attitudinal differences in terms of values and beliefs, was also found in organisational diversity programmes and leadership hierarchy structures (ranging from diversity quotas to an informal 'Women in Business' group), deliberately designed to cover leadership at present, future and potential levels, offering distinct coaching support at each stage. Finally, the majority of participants (9) reported coaching dimensions and expectations as a challenge spanning all generations of leadership, adding layers of complexity to evaluation practice, through different timeline perspectives and judgements made by practitioners over evaluation. The data found that conflicting and contradictory generational attitudes characterised this as a challenge for evaluation. The perceived transiency of millennials was described as problematic by Charlie:

> "Our challenge is millennials and retention; they want to move on after two or three years and don't value building a career."

Alternatively, Peter placed this in context of the demands of a dynamic industry, implying transiency was seen as mutually beneficial :

> "Our policy now is we are only going to hire top talent capable of being really impactful, and I would rather have someone great for two years than average for ten."

*Organisational context*

Organisational context emerged from the data as the internal characteristics of the organisation and how they influence the experiences of practitioners. As a moderator, organisational context, often referred to by participants across the conceptual framework as 'culture', was found to be the 'unique DNA' of the organisation, shaping and impacting evaluation in terms of consistency of data, competency of data collection and dissemination, and the environment for engaging with evaluation on a wider strategic platform. When directly questioned about data collection, usage and barriers, organisational context was also found to be a regular response from participants as justification for evaluation limitations, informal approaches, and stances disassociated from the organisational strategy. Cultural dimensions encompassed a number of unique perspectives, including the influence of the CEO, cynicism towards a coaching environment and internal governance. Charlie describes governance in terms of a partnership:

> "We are an old fashioned partnership built on principles of 'Trust, Know and Respect'. Decisions are made on these principles, it is hardly scientific - rightly or wrongly - but it's how we work. A whole string of KPIs for evaluation just would not be appropriate."

The data revealed evaluation stakeholders across all sectors ranging along an operational/strategic continuum. At an operational extreme, evaluation was limited to an HR stakeholder measuring exploitative targets contradicting leadership strategy (expanded in the next section). At the other extreme, judgements for evaluation were made with questionable competency by 'disinterested' leaders, or those with financial self-interest, espousing individual perspectives for strategic alignment, hindering transformational strategies. Alan explained:

> "Evaluation is entirely in the hands of 'interested' leaders. Therefore, you could argue it's strategically aligned; on the other hand it is designed by those leaders with fixed perceptions of traditional behaviours, which in turn, slows our progress in this area."

Therefore, organisational context was found to provide inconsistent interpretations across the research conceptual framework, with significant implications for evaluation data and dissemination, as well as future design.

**Sub-theme: Exploring evaluation moderators**

The data was then examined for participants' experiences of evaluation methodologies (formal or informal) for leadership coaching, to explore how moderators might relate to each other, impact evaluation and provide a deeper investigation of barriers. Employing the conceptual framework, the research examined a number of current evaluation approaches in detail, where, broadly speaking, the significant problematic was found to be the gap between intentionality and practice. The following example (***Figure** 7*) of a collaborative evaluation approach illustrates the relationship dynamic between evaluation status and organisational context moderators, and their impact on evaluation, revealing a potential source for inconsistency and distortion through the distinct strategic and operational interpretations for strategy implementation and evaluation:

*Figure 7*: An example of moderators impacting collaborative evaluation by distorting strategic and operational perspectives

| | **Executive Board (including HR)** | |
|---|---|---|
| **Executive Strategy for performance** | | **HRD implementation strategy** |
| Mergers & acquisitions | | Managing risk (legal) |
| Anticipate (opportunity generation) | | Respond to complexity to manage change |
| Scalability (strategic as part of M&A business) | | Scalability (operational) to manage multiple conflicting structures and systems |
| Allocation of resources to areas of high impact | | Delivering a culture of collective understanding to manage strategic alignment |
| Capacity building | | Recruitment and retention |
| RoI | | Coaching efficacy |

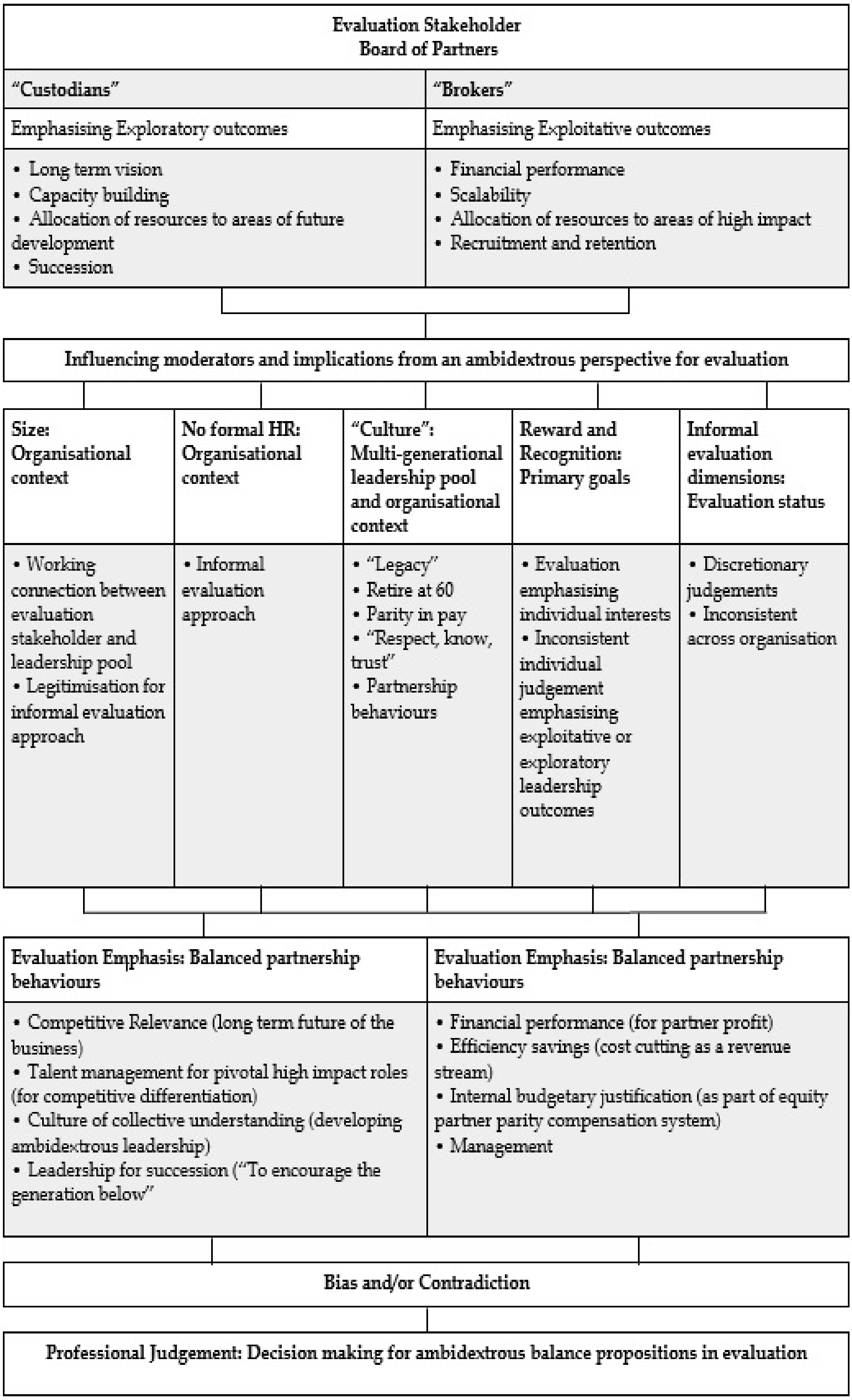
In this example, where a private sector organisation is focused on mergers and acquisitions as a subordinate strategy, evaluation relies on the strategic interpretation of leadership outcomes by a non-strategic HRD. The schematic illustrates the ambidextrous outcomes of executive strategy, interpreted across the conceptual framework, in terms of an HR perspective for implementation. This shows how moderators impact evaluation, distorting the strategic targets of the executive through the operational focus of the HR function. In this case the strategic disconnect is the cause of the gap between the stated expectations of the organisation and the focus for evaluation. Moderators are seen to combine, creating problems for evaluation by corrupting the process, contradicting rather than serving the stated leadership coaching ambidextrous dimensions.

It could be argued, the influence of a primary goal is neutralised in this example by the strategic disconnect between the executive and HRD. However, at a practice level, the participant attempts, through the evaluation design, to collaborate with the executive, including members of the board as sponsors of specific leadership coaching modules and their subsequent evaluation. Despite best intentions for an integrated approach, this was found to create a sub-context where senior managers, who were described as "naturally competitive", were given responsibility to assess and evaluate leadership outcomes in their individual teams, with the potential for inconsistency or bias through financial (primary goal moderator) or status (multi-generational leadership pool moderator) self-interest. This action increased the potential for inconsistency and bias in interpreting evaluation data, liable to being further skewed by financial self-interest or a reluctance, suggested in this interview as a generational trait, to develop and promote fully the next cohort of organisational leadership. Daisy expanded:

> "In some cases the evaluation data can get distorted by a lack of support from stakeholders struggling with their own insecurities."

An entirely strategic approach reveals an alternative view. ***Figure 8*** represents an example of moderators impacting evaluation in a private sector organisation, characterised by strategic stakeholders with diverse interests. In a traditional partnership with no formal HR function, focused on a primary goal of financial performance for profit, the dominant influencing moderators are primary goals and organisational context combined. Unlike similar research contexts (private sector strategic approaches), the nature of the governance of a partnership provides an additional layer of internal tension between exploitative and explorative evaluation emphasis. The idiosyncrasies of the organisational context moderator, built around “old fashioned partnership principles: know, trust and respect”, and its size (circa 500 employees), legitimise discretionary judgements, in evaluation made by equity partners with distinct attitudes to leadership development, emphasising either exploitative or explorative outcomes, inconsistently across the organisational leadership pool. In this example, equity partners, the evaluation stakeholders, are defined as either “custodians” or “brokers”. Custodians are reported to emphasise explorative outcomes for succession; capacity building; investment in leadership coaching; and future competitive relevance, while brokers pursue exploitative outcomes for short term financial performance and efficiency saving. Here, the barriers to evaluation, categorised at a basic level as emanating from the primary goal moderator (resistance, bias and collective understanding), are exacerbated by the organisational context moderator. The schematic shows the influence of the organisational context, in terms of evaluation moderators.

*Figure 8*: An example of moderators impacting strategic ambidextrous evaluation in a partnership characterised by strategic stakeholders with diverse interests



Primary goals, evaluation status and organisational context were mentioned by all participants as influencing evaluation. Only half of participants specifically placed multigenerational leadership pools as directly impacting evaluation practice, despite universal recognition of distinct generational character traits as challenging organisations. Primary goal and evaluation status moderators, working in concert, were described by 10 participants (5 private, 2 public & 2 third sector) as the main source of evaluation problematics. Organisational context in concert with primary goals and evaluation status were reported as a three moderator combination in the private sector (8). Six participants (across all sectors) directly stated all four moderators combined to influence evaluation strategies. The data revealed combinations of moderators exposed the contradictory context for evaluation. For instance, one private sector participant described the evaluation "loop", where explorative leadership outcomes were being assessed against an exploitative primary goal, by systems emerging from an evaluation status designed by organisational context based on internal structures in transformation. Alan explained:

> "Evaluation is a loop. We strive for creative leadership for the long term, but reward people only on the short term [financial performance], because our job is to deliver dividends to the shareholders. To do this, we rely on discretionary judgements from leaders we are putting through transformation programmes to develop creativity, but who are still part of the short term system."

Ambidexterity was found to open up the purview of evaluation by placing it in a wider strategic context, from where key themes emerged redefining problematics and promising movements in the field. As part of a practitioner perspective research approach, problematics were investigated in the context of the anomalous environment for evaluation, while an examination of extant strategically ambidextrous frameworks provided new insights into the potential for evaluation, both in system design and as an informant for the organisational strategy. Emergent moderators produced explanations for the current state of evaluation practice, as well as a deeper understanding of what organisations needed in the practical design of evaluation frameworks. This implied a potentially wider strategic contribution to negate evident disinterest in evaluation and its low priority status. Ambidexterity has elicited a stream of data, enriching knowledge and, at the same time questioning whether the current complex environment exacerbates practice challenges or, is in fact an enabler for evaluation data collection and usage.

# Chapter 5 - Discussion and implications for practice

## Introduction

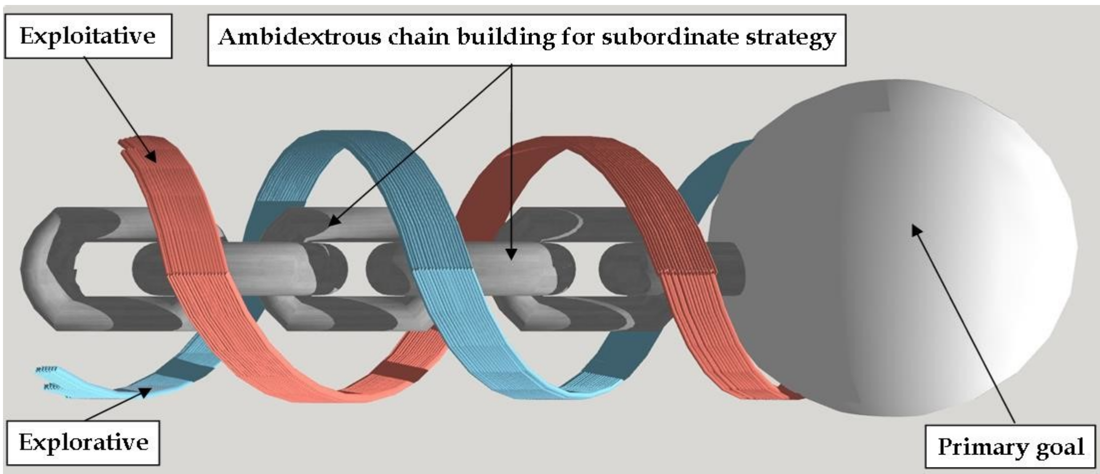
This chapter draws to a conclusion the flow of research in a discussion developing themes from extant knowledge and data from the participant inquiry. A review of literature produced three themes: problematics, emerging contexts and ambidextrous orientations. These were developed through a strategic lens of ambidexterity, and three new themes emerged: anomalies, structures and influencers. This discussion interrogates literature with new data emerging from participants' experiences and an ambidextrous perspective, in pursuit of actionable knowledge. As such, the findings from this study have implications for practitioners and these are discussed in three new iterations of developed themes. Firstly, the influence of ambidexterity in providing opportunities for researchers and practitioners to re-examine problematics and explore the strategic potential of evaluation. Secondly, an investigation of existing ambidextrous structures and evaluation frameworks to understand influencers and refresh knowledge of problematics. Finally, the practical implications of connecting ambidextrous strategy to evaluation, exploring promising movements for future research and development.

## Strategic opportunities for evaluation resulting from ambidexterity

Scholars writing about the problematic nature of evaluation present the emerging context, characterised in this study by ambidexterity, as a major influence on practice and a source of evaluation barriers. However, this study found ambidexterity presented a number of strategic opportunities for both researchers and practitioners, with the research environment and the organisational context emerging as key influencers of evaluation problematics. In literature, evaluation is generally treated as an operational challenge, with the influences of turbulent external forces and intensifying accountability trends focusing attention on the evolving role of HR as the stakeholder for leadership coaching and evaluation, introducing strategic elements to an operational exercise. A number of authors have argued, narrow unilateralist or managerialist research perspectives have contributed to the limited scope of evaluation, specifically the emphasis on short term known targets with high financial legitimacy. In adopting a lens of ambidexterity, this study has responded to the empirical findings of scholars such as Phillips (2011) and Yapp (2009), where it is asserted evaluation, to progress, should move beyond familiar accountability metrics towards an integrated analytical process aligned to clearly identified strategic goals, by providing a practitioner perspective. It was found that this viewpoint enabled an effective shift in emphasis from an operational to an executive focus, presenting participants with a strategic platform to investigate evaluation, opening up new opportunities for future research and development. As a result, evaluation problematic were re-examined and interpreted by participants in terms of practice anomalies. These anomalies emanated from the conflicting nature of operational and strategic approaches and the disconnect between the emerging and organisational contexts, specifically emergent leadership outcomes and evaluation metrics. Facilitated by a strategic lens, scholarly classifications of problematics (contingencies, intangibles and strategic alignment), redefined as anomalies by the data, are discussed along with the opportunities, afforded by ambidexterity, to close the gap between theory and practice.

The literature described contingencies as the influence of meta-trends and external contextualisation, impacting on the organisation's ability to align evaluation to clearly identified strategic goals. However, findings from this study challenged this description, specifically Kaufman's (2015) assertion that, as a result of external forces, evaluation outcomes have become moving targets with which organisations have been unable to cope, and it was revealed participants had responded positively to the emerging context. This was evinced through a new set of leadership behaviours to deliver an adaptive environment for competitive high performance, facilitated by various leadership competency or transformational programmes and operating models, identifying and explaining the contribution of balanced ambidextrous outcomes, building chains for subordinate strategies to achieve a primary goal.

***Figure 9:*** Ambidextrous balance model for subordinate strategies to pursue a primary goal




Having established ambidexterity as a deliberate strategy for high performance, data suggested participants were challenged to accommodate the emerging context in terms of evaluation, which was found to contradict the organisational strategy. These findings supported Hatum's empirical work, claiming a new radical mindset was needed to accompany ambidextrous strategies, to dismantle traditional hierarchies and departmental silos. Participants reported the influence of the organisational, rather than the emerging, context more impactful on evaluation. Contingencies were not considered to be problematic but, participants struggled to connect emerging outcomes and the organisational strategy to evaluation metrics, which remained primarily focused on measurable short term targets of little relevance to the wider organisational strategy. Ambidextrous frameworks were found to support and advocate for overarching strategy, where these models were less effective highlighted the fallibility of cultural perspectives and internal structures that emphasised operational over strategic perspectives.

Intangible outcomes are defined in literature in terms of emerging unconventional and non-traditional leadership goals and coaching dimensions, precipitated by contingencies. These were redefined by the research as a practice anomaly, where evaluation metrics were found to be in conflict with value outcomes. The research findings extended Cheese's (2010) definitions of the new intangible challenges for leaders, through various frameworks promoting learning, innovation and creativity, and a strategically aligned understanding of values. These ambidextrous frameworks effectively demystified intangible outcomes and their strategic contribution, in contrast with Ely et al's (2010) study, where, it is claimed, the idiosyncratic nature of leadership coaching was a major source of evaluation problematics. However, these models were either not expanded to include evaluation, or found to be applying evaluation metrics that contradicted the explorative leadership outcomes emphasised by participants. Therefore, intangibles was found to be a more complex problem for participants, influenced by the organisational context, defined by the application of effective evaluation metrics to meaningful targets, rather than (as presented in literature) the identification of explorative outcomes and their contribution to primary goals. For instance, performance for profit organisations were found to contradict long term capacity building strategies by focusing on evaluation of short term financial targets, influenced by self-serving reward and recognition systems. Similarly, public and third sector organisations reported losing sight of explorative evaluation outcomes in frameworks designed to justify exploitative targets to leaders motivated by purpose.

The data presents a more complex explanation of strategic alignment as a barrier, characterised in literature by the diverse outcomes of different activities with multiple interpretations for what constitutes outcome value. Where the literature points to the emerging context as a problematic source, the data revealed ambidextrous frameworks were found to facilitate strategic alignment, responding to the scholarly challenge to practitioners to provide clear and connected coaching outcomes for evaluation. Furthermore, the suggestion from Watson (2013) that an adaptive environment creates another layer of complexity for strategic alignment was rejected by the data, as participants across all sectors reported no difficulty in actively building ambidextrous models connecting multiple stakeholders and different activities to primary goals. The data revealed the complexity of strategic alignment lay in a research environment which was operationally focused, and the impact of internal structures as part of the organisational context. These findings supported the empirical work of Sparrow and colleagues (2014) criticising research that continues to treat strategic alignment superficially across organisations, ignoring its unique characteristics shaped by business outcomes, values and leadership philosophies, and these are captured in the evaluation moderators emerging from data. Accordingly, the formal methodologies espoused by scholars were not evident in participating organisations' evaluation processes, confirming Angrave et al's (2016) claim that scholarly theory is out of step with rapidly evolving organisational needs, suggesting the gap between theory and practice was a manifestation of distinct operational and strategic perspectives in conflict. This was evident in the data where formal and informal evaluation status emerged as a key moderator.

Angrave et al include four reasons for the problematic nature of strategic alignment and these were evident in participant responses. Firstly, they question the ability of practitioners to evaluate leaders in strategic terms, particularly where the evaluation status is formal or the stakeholder is the HR function. This was exemplified by the data exploring the impact of moderators, and how strategic targets are distorted by the operational interpretation of the HRD as the evaluation stakeholder (***Figure 7****)*.

Secondly, the competence of practitioners to retrieve data that was strategically useful, manifested as an evaluation anomaly, where it was found participants did not pursue evaluation of those outcomes they stated as being valuable. Thirdly, they claim a silo mentality, reflecting internal structures, hindered evaluation through blurred strategic sight lines. This was evinced in the data where participants were found to employ multiple models for leadership performance management which they failed to connect in terms of evaluation. Furthermore, organisational context, classified as an evaluation moderator, revealed the potential for bias and contradiction from evaluation systems that served either financial self-interest or departmental budgetary accountably. The data also revealed the implications of a proprietorial non-collaborative approach to evaluation (***Figures 5 & 6****),* where valuable strategic insights were deliberately overlooked by an operational stakeholder failing to utilise external strategic data. Formal responsibility for evaluation and a reluctance to pass on sensitive strategic information to the executive meant that a source of data relevant to the organisational strategy went untapped. Finally, the organisation was criticised for not integrating HR as a strategic partner and this was supported by the anomaly emerging from data that, despite the priority placed on emerging leadership outcomes and coaching dimensions, evaluation was considered as having low strategic value.

It could be argued that attempts to present integrated evaluation systems in literature, including HR analytics, score cards and value inventories, are hampered by a scientific approach and representative of the gap between scholarly theory and practice. The lack of participant engagement with evaluation theory confirmed Wall et al's (2016) claim that research complexity, characterised by dissonance, communication and access, has failed practitioners in providing workable tools. This reflected a bifurcation in literature, where a number of evaluation frameworks were criticised by authors from contrasting schools of thought as being based on narrow prioritisation or traditional HR perspectives, exemplifying this gap. An ambidextrous lens was used to shift the research perspective and provide a strategic context for evaluation. Derived from literature, the research's conceptual ambidextrous framework was found to represent organisational balance propositions relevant to participants, facilitating a strategic opportunity to make connections between exploitative and explorative outcomes, across the six coaching dimensions of leadership development. The data also reflected the research assumptions: ambidexterity (in varying interpretations) was familiar to participants and representative of the current complex working environment; and the development of a framework built around ambidextrous dimensions offered conceptual value that might usefully be developed in evaluation practice. The four main target areas for leadership coaches (idealised influence, inspirational motivation, intellectual stimulation, and individualised consideration) asserted in the work of Bass et al (2003), emerged from the data as coaching outcomes for cognition, knowledge, motivation, behaviours, emotions, and culture, as represented in practice frameworks, providing a structured approach to the idiosyncratic nature of the coaching intervention. These ambidextrous structures delivered the causal link scholars claimed to be missing from evaluation practice. However, having established this link, placing leadership coaching in an ambidextrous strategic chain of impact, practitioners stopped short of extending this to evaluation. Therefore, the strategic influence of ambidexterity as a research context opened up the possibility that ambidextrous balance, far from being another source of problematics, was in fact a strategic opportunity for evaluation.

## Exploring ambidextrous moderators for a deeper understanding of evaluation problematics

This section explores evaluation influencers emerging from the data to update thinking in areas such as barriers and (evaluation) data usage, where research found strategically ambidextrous frameworks challenged scholarly assertions for problematics, supporting the criticism from some authors that they are reported one dimensionally. In broad terms, the data resulting from a lens of ambidexterity redefined knowledge of problematics in terms of four evaluation moderators (***Table* 7**): primary goals, evaluation status, multigenerational leadership talent pools and organisational context (often referred to in data as "culture"). Using the conceptual framework as a reference point from literature, moderators were developed to elicit a deeper understanding of evaluation problematics.

***Table 7*:** Cross-referencing reported evaluation problematics against the conceptual framework to illustrate the relevance and impact of ambidextrous dimensions

| **Evaluation moderator** | **Reported evaluation problematic areas (from data)** | **Reported dimensions of evaluation problematic areas (from data)** | **Conceptual framework balance proposition reference point (from the literature)** |
|---|---|---|---|
| **Primary goals** | Data usage | • Reward and recognition systems<br>• Performance management<br>• Advocacy (coaching) | Budgetary justification versus culture of collective understanding<br><br>Performance versus future competitive relevance<br><br>Coaching efficacy versus fuller range of coaching outcomes |
| **Evaluation status** | Dissemination | • Operational or strategic<br>• Formal or informal (dissemination)<br>• Relevance of data<br>• Multi stake holders | Complex environment versus opportunity generation<br><br>Efficiency savings versus talent management for pivotal high impact roles |

| | | | |
|---|---|---|---|
| **Multi-generational leadership pools** | Timelines | • Leadership transition (behaviours)<br>• Succession<br>• Leadership coaching impact timelines<br>• Retention of future leadership talent | Management versus leadership |
| **Organisational context** | Competency | • Formal or informal (systematic)<br>• Interpretation<br>• Intentional bias<br>• Inconsistent | Budgetary justification versus culture of collective understanding |

When asked specifically about evaluation data collection and usage, four individual problematic areas within the domain of each moderator were reported (data usage, dissemination, timelines and competency) the dimensions of which, when cross-referenced against the conceptual framework, aligned directly or indirectly to an ambidextrous balance proposition. Within the four reported problematic areas, six dimensions for barriers emerged (***Table 8)***: the evaluation environment, bias and contradiction, responsibility for evaluation, quality of evaluation data, generational reach, and time expectation management.

***Table 8*: 6 new dimensions for evaluation barriers emerging from moderators**

| **Evaluation problematics (barriers in literature)** | **Dimensions and implications for leadership coaching** | **Influencing evaluation moderators** | **Conceptual framework evaluation reference** |
|---|---|---|---|
| **Evaluation environment (*Strategic alignment*)** | Managing tension between exploitative and explorative outcomes: in the context of a dominant primary goal | Primary goals<br>Organisational context | Balancing performance with competitive relevance in the context of managing risk |
| **Bias and contradiction (*Strategic alignment and intangibles*)** | Reward & recognition systems: emphasising primary goal<br>Discretionary judgements:<br>• Personal or departmental financial interest<br>• Strategic competence<br>• Operational competence<br>Coaching efficacy: advocacy misuse for marketing<br>Interpretation: of outcomes of data | Primary goals<br>Evaluation status<br>Organisational context | Balancing internal budgetary justification with a culture of collective understanding in the context of managing strategic alignment<br><br>Balancing coaching efficacy with a fuller range of coaching outcomes in the context of managing professional judgement<br><br>Balancing RoI with wellbeing in the context of managing professional judgement |

| | | | |
|---|---|---|---|
| **Responsibility for evaluation** (***Strategic alignment***) | Proprietorial interest<br><br>Confused interest<br><br>The gap between operational and strategic approaches: What is stated as valued and what is being evaluated | Primary goals<br>Evaluation status<br>Organisational context | Balancing internal budgetary justification with a culture of collective understanding in the context of managing strategic alignment<br><br>Balancing a complex environment with opportunity generation in the context of managing change |
| **Quality of evaluation data** (***Intangibles***) | Equivalent of Kirkpatrick's levels 1-4: Self-informing, anecdotal, informal<br>Disconnected competency and assessment frameworks: run in parallel | Evaluation status<br>Organisational context | Balancing coaching efficacy with a fuller range of coaching outcomes<br><br>Balancing RoI with wellbeing & engagement in the context of managing professional judgement |
| **Generational reach** (***Contingencies***) | Flawed succession strategy<br><br>Retention of future leadership talent pools | Multigenerational leadership pools<br>Organisational context | Balancing management with leadership perspectives in the context of managing social integration and relationships<br><br>Balancing efficiency savings with talent management for pivotal roles in the context of managing multiple structures |

| | | | |
|---|---|---|---|
| **Time expectation management (*Intangibles*)** | Evaluation over time: for impact of coaching on leadership behaviours<br>Leadership transiency: continuity of coaching | Primary goals<br>Evaluation status<br>Organisational context | Balancing coaching efficacy with a fuller range of coaching outcomes |

The three broad areas for problematics, derived from the literature, are included in the table (bracketed in ***Table 8***), to highlight development facilitated by ambidexterity. These two tables extend empirical research around problematics, illustrating the relationship between evaluation moderators and barriers, with emerging dimensions expanding understanding and de-limiting scholarly assertions (including multiple definitions, prioritising interests and conflicting perspectives, one dimensional research perspectives and the idiosyncratic nature of leadership coaching), and these are discussed and developed below.

*The evaluation environment*

Many methodologies presented in literature were found to advocate a scientific analytical approach to evaluation, suited to operational or managerialist stakeholders, espousing theory that is both measurable and actionable, thereby emphasising short term tangible targets. Accordingly, authors such as Angrave and colleagues (2016) and Kaufman (2015), attributed evaluation limitations to the narrow, one-dimensional research environment. In response, this study adopted a strategic lens to negate limitations from the research environment. At the same time, data from this approach contrasted with empirical criticism, redefining the evaluation environment from a research to a practice issue. This was generally found to be a twofold problem for practice, reflecting the influence of the organisational context moderator focusing attention onto exploitative targets covering both operational and conceptual dimensions. Operationally, although ambidexterity was found to be a strategic choice, respondents reported the organisational context did not support a balanced approach and participants experienced ambidexterity as something to be earned. In other words, long term explorative leadership outcomes were only afforded when short term exploitative targets had successfully been achieved. Conceptually, participants made references to organisational context, specifically in terms of culture, values and historic attitudes, as resistant to evaluation and reported being perplexed by multiple definitions and their relevance.

*Bias and contradiction*

The CIPD's (2007, 2014) assessment of evaluation as a loop connecting unique definitions of value outcomes to appropriate and relevant measuring tools and metrics, was in contrast to the data, and manifested as a key anomaly: what participants claim as being of value, was not the focus for evaluation. Empirical research focused on strategic alignment and intangibles as problematic for organisations in connecting leadership coaching to the wider business strategy for evaluation, and this definition was rendered simplistic by the data. Kraiger et al's (2004) assertion that evaluation requires a clear single destination outcome as part of a meaningful theory of impact was accepted throughout the data. However, despite transformational leadership programmes and leadership competency frameworks focused on connecting outcomes directly to a primary goal, performance management reviews and appraisals were found to be aligned to remuneration, discouraging examination of outcomes with weak financial legitimacy. Participants' success in achieving a meaningful theory of impact was, in practice, found to be counter-productive and in conflict with scholarly assertions, to such an extent that primary goals emerged as one of the four moderators, with financial performance (for profit or accountability), facilitated by systems, judgements or advocacy, either emphasising short term outcomes, or acting as a source of bias and contradiction.

Although participants were highly vocal in articulating the value of emerging leadership outcomes, bias and contradiction emanating from compensation systems that bypassed explorative outcomes, was universally acknowledged. Furthermore, despite general awareness, a lack of commitment to develop systems limiting bias implied it was perceived as being deeply ingrained in the organisational context, defined by a dominant primary goal. Evaluation status was found to be the impactful moderator in evaluation judgements. Authors such as Beer (2015) encapsulate the operational focus adopted in literature, claiming evaluation metrics that contradicted organisational strategy was due to the failure of HRM to evolve as a strategic function. However, the research found the distinctive nature of this problem was not in the operational approach of HR, but in the personality of those undertaking evaluation. In the research, participants reported inconsistent data from discretionary judgements made by evaluators with varying levels of competence, 'interest' and different motivations. Where leadership coaching and evaluation was entirely in the hands of an 'interested' partner, or manager with a vested financial interest, participants made a case for strategic alignment. However, this was found to have a contradictory effect in practice, referred to in this study as strategic alignment bias, where evaluators imposed their interpretation of strategy for the primary goal, emphasising short term exploitative targets as metrics for evaluation of leadership coaching, for either self-serving drivers, or as sceptics of the strategic contribution of explorative outcomes.

Finally, a third class of bias was found to emanate from coaching advocacy, specifically where evaluation formed part of the coaching contract or was put forward as an endorsement of coaching credentials. This area of bias was referenced in literature but not explored as a problematic, possibly reflecting the unilateralist approach of authors. Where it was included in scholarly debate, it was in terms of the validity of RoI, specifically in the advocacy of a coaching engagement. However, data collected from an established coaching consultancy provided an alternative perspective. In the context of bias, this participant was highly cynical about evaluation data, specifically provided by the coaches themselves. This type of evaluation was considered tendentious and an "abuse of trust", calling into question evaluation competence and motivations.

*Responsibility for evaluation*

The data uncovered evidence of the gap between executive and operational functions, where strategy was vulnerable to misinterpretation or distortion from a disconnected evaluation stakeholder. The literature does not contrast and compare operational and strategic approaches but generally treats evaluation as an operational function. The data supported the school of thought, including authors such as Angrave et al (2016) and Morrell and Learnmouth (2015), that operational evaluation, as part of an HR function, is limited in terms of competency, internal departmental conflict and disconnection from the organisational strategy (from which leadership coaching outcomes are designed). Ambidexterity provided a strategic context to explore the implications of operational, executive or collaborative responsibilities for evaluation. The data found the evaluation status moderator significantly impacted the evaluation process, distorting or limiting the validity of (evaluation) data, with participants inconsistent in their responses when questioned about where the responsibility for evaluation lay. Organisational context, including size and culture, and the nature of the primary goal, was used by participants to explain evaluation status as either informal or formal; strategic or operational; structured or discretionary.

Accordingly, evaluation status allocated responsibility to either operational (HR) or strategic (executive) evaluators. These were found in practice to be treated as proprietorial, mutually exclusive and non-collaborative in approach, with often contradictory interpretations of leadership outcomes and coaching dimensions (as exemplified in ***Figure 7***) used as evaluation metrics. The research found contrasts in participant experiences between informal, strategic, discretionary approaches and formal, operational, structured, systems. The former were claimed to be vulnerable to the dominant interest of the primary goal and the fixed perceptions of familiar leadership behaviours with strong financial legitimacy, thereby hindering innovation, creativity and succession, while the latter were prone to inconsistent interpretation and strategic misalignment. The complexity of this problem was exacerbated in cases where there were multiple evaluation stakeholders or confusion around responsibility, often the result of a lack of departmental accountability. Where responsibility was found to be proprietorial, there were significant implications of self-interest for the dissemination of data, adding a further layer of complexity to this barrier.

*Quality of evaluation data*

Parallels between criticisms of evaluation data collection and experiences of respondents reporting data of limited strategic quality, were apparent. Survey findings from the CIPD (2013) claiming evaluation data collection was largely confined to self-reporting coachee satisfaction, were closely reflected in the responses of participants. Respondents were found to have approached collection of evaluation data at the equivalent of Kirkpatrick's taxonomy levels 1 to 4 (reaction, learning, behaviour and results) although, in practice, this was found to be universally limited to levels 1 to 3. Participant responses expanded the CIPD findings, with quality of data emerging from collection method limitations as a two dimensional barrier: the limitations of discretionary and anecdotal data from self-evaluation; and competency (emphasising exploitative) and behavioural (emphasising explorative) frameworks that were not integrated. At one level, self-evaluation was found to be reported, as a positive experience for leaders, to encourage reflection and take responsibility for personal development and coaching programmes. These findings supported scholarly theory including Grant's (2013) Personal Case Study methodology, advocating self-reporting procedures as promising movements for evaluation when worked in concert with standard metrics. However, participants found it challenging to connect or convert data to relevant metrics and the majority questioned the quality of anecdotal evaluation data, collected inappropriately due to the influence of performance management systems.

Although participants had in place multiple frameworks to assess leadership competencies and behaviours, these were found to be unconnected and a missed opportunity to develop valuable data, integrating both exploitative and explorative outcomes to assist evaluation practitioners and inform wider strategic thinking (see ***Figure 6***). This supported findings by the CIPD (2015) estimating only 7% of organisations intended to evaluate the wider impact on business or society, which proportionally corresponded with the responses of participants, reflecting the lack of ambition for evaluation data. Participants reported low strategic value for evaluation data, primarily collected to inform reward and recognition or coaching operational dimensions. The organisational ambition for evaluation is generally synonymous in literature with the debate over the appropriateness of RoI, as either the ultimate benchmark for quality data, or a contrived and complex set of calculations with little credibility. Participants universally reported a lack of intent over RoI as an evaluation metric, despite existing frameworks identifying the contribution of ambidextrous outcomes to a primary goal, effectively isolating the causal relationship and impact of the coaching intervention. This finding sits in contrast with Phillips et al's (2012) assertion that RoI is the ultimate evaluation metric, with data showing participants assumed the financial contribution of leadership coaching in the overall organisational performance and as such, would only consider examining RoI if performance was unusually poor.

*Generational reach*

Demographics, reported in literature as an emergent key moderator for evaluation, is supported by participants' responses, specifically in terms of accommodating the expectations of next generation leadership cohorts. However, the research revealed a more layered problematic in practice than that defined by scholars. For example, authors such as Woods (2016) and McDonnell (2011) revisit the war for talent and the expectations of a millennial leadership pool. These are argued to be unfamiliar to organisations, who must now strive to comprehend and react to a new critical variable, reassessing the internal workings of the organisational context. Whereas, this was acknowledged, participants provided a more complex definition, revealing generational leadership dimensions were experienced as problematic by participants in two ways: succession and retention. Barriers resulting from the multigenerational leadership pool moderator were found to be the design of organisational context and generational character trends, exacerbated by the interests of the individual, regardless of the best intentions of internal systems designed to counter bias and contradiction. For instance, in the case of a participating private sector partnership, the organisational context requires partners to retire at 60, reported as a deliberate facilitator for succession. However, in reality, incumbent leadership were reported to be "protective and insecure" around succession, and focused on exploitative outcomes as a significance of limited earning potential. At the same time, flawed succession was found to be connected to retention, and most participants reported deliberate attempts to retain top talent through distinct coaching programmes and lateral moves. The distinct development of future leadership talent was reported to be a critical point of focus for all participating organisations; however, in the context of evaluation, a coaching intervention designed to emphasise and develop potential, was found to be extremely problematic in terms of evaluating intangibles over indeterminate timelines.

*Time expectation management*

Timelines have been consistently stated in both literature and practice as problematic. Research from Ely et al (2010), asserting proximal and distal outcomes over indeterminate timelines as contributing to the problematic nature of leadership coaching evaluation, is representative of the scholarly stance; however, the data produced a complex definition for practice. Where scholarly references were generally confined to timelines impacted by evaluation status and organisational context moderators, the data also found participants had varied time expectations for leadership coaching, depending on the primary goals and the dynamic nature of the work. One participant's belief that top talent is short term in the context of a fast moving business, places capacity building, categorised as a long term explorative outcome, in a short term perspective, specifically where this industry is dominated by an emergent generation in terms of both leadership and workforce. This additional perspective provides another dimension to time as an evaluation barrier, and a requirement for an agile system that recognises the collection of quality data serving a unique set of organisational expectations.

The headlines from data around emerging problematics emphasise three points. Firstly, existing ambidextrous frameworks, despite the exclusion of an evaluation function, contradict scholarly assertions that intangible explorative outcomes require an unconventional complex system for evaluation. Secondly, poor quality data is found to be sourced from the organisational context, specifically internal structures such as reward and recognition systems, or from the influence of operational or strategic leadership coaching stakeholders, rather than attributed to the faulty design of an evaluation system. Finally, it might be argued that participants, through existing operational and conceptual ambidextrous balance mechanisms, do not accept the assumption in some theoretical systems, with regard to the 'logic' element of design, where the literature asserts that organisations cannot explain the connection between leadership behaviours and strategic success. This study now uses the fresh insights from the research data around moderators and emerging problematics to discuss promising movements and practical implications of an ambidextrous framework for evaluation practitioners.

## Connecting strategy to evaluation: 7 promising movements and implications for evaluation in an ambidextrous context

The gap emerging from data between new leadership outcomes and coaching dimensions, and evaluation systems and targets, is a practice manifestation of two seminal claims in literature. Firstly, the CIPD's (2013) assertion, evaluation is at a critical juncture but stuck in a recurring loop and, secondly, Levinson's (2009) prognosis that future leadership coaching programmes, unsupported by strategically aligned evaluation data are vulnerable to being designed in an analytical vacuum. This section discusses and develops promising movements from the data to contribute insights into the practical components for a strategically aligned evaluation model. Filtered through a lens of ambidexterity, data interrogated extant knowledge, recasting problematics as practice anomalies, while emerging contexts have revealed strategic opportunities that challenge scholarly perspectives of evaluation. Accordingly, a new set of evaluation moderators have emerged, as a source of knowledge to close the gap between theory and practice, from which to explore promising movements and their implications for practice. Seven promising movements have resulted from the data, qualified as either systems or thinking in current practice (potentially underused in the context of evaluation), negation of scholarly definitions of problematics, or areas of opportunity for future research and development.

*Universal recognition of ambidextrous balance as a strategic choice*

Ambidexterity was originally adopted to provide an effective strategic lens for research, however, from the data it was evident participants recognised ambidexterity as a strategic opportunity to deliver an adaptive environment for high performance in a dynamic and complex environment. Derived from literature, the conceptual framework for ambidextrous balance propositions was found to reflect current leadership decision-making, and participants were familiar with the process of making connections between outcomes across the six suggested coaching dimensions for leadership development. In line with Fillery-Travis and Lane's (2006) assertion that creative strategies, driven by leadership, delivered competitive advantage in the emerging context, this framework, and others like it, provided participants with a practical opportunity to explore leadership outcomes in the unique organisational context. The positive and deliberate approach from participants to ambidexterity, opened up strategic opportunities for research and expanded the discussion to include evaluation system design and focus on the third broad research question, exploring whether a conceptual evaluation framework, built around ambidextrous dimensions, might support evaluation practitioners.

*Chain building: Operational balance mechanisms*

Universal awareness of strategic opportunities of ambidexterity, was found to be a driver for operational and conceptual balance mechanisms. The data found operational balance mechanisms encapsulated Chen et al's (2016) focus on leadership that cultivated a consensus of purpose, promoting behavioural integration and collective understanding as essential components of strategic alignment in the emerging context. These mechanisms emerged as models for chain building ambidextrous outcomes, to define specific leadership targets and coaching dimensions as part of a strategy for an overarching primary goal. Examples included transformational leadership programmes and single operating models, both designed to encourage leaders to adopt a balanced view of exploitative and explorative outcomes by connecting them in a formal structure and outlining their contribution to the organisational strategy. These frameworks were found to clarify and explain leadership outcomes in the context of a primary goal, isolating causalities as an opportunity for evaluation.

*Chain building: Conceptual balance mechanisms*

Conceptual balance mechanisms were generally found to be designed around leadership competency frameworks, emphasising explorative values and behaviours. The data found these were used to make sense of unfamiliar emerging outcomes, characterised by Hatum (2010) as contributing to the problematic nature of evaluation, by building chains across a conceptual framework, to explain the contribution of explorative outcomes to an ambidextrous strategy for a primary goal. In common with operational models, conceptual balance mechanisms provide frameworks that allow a structured examination of intangible outcomes, generally perceived by scholars and practitioners as immeasurable. In connecting intangible outcomes to tangible targets, these frameworks potentially provide practitioners with an opening to evaluate coaching impact on explorative leadership outcomes, by placing them in an exploitative context for inclusion in performance management systems. Operational and conceptual balance mechanisms are perceived as an opportunity to connect strategy to evaluation. They respond to assertions in literature that clearly aligned strategic targets are a key driver for evaluation and provide a causal link. Furthermore, these frameworks have the potential to provide a new source of data to inform the wider strategy, while simultaneously challenging scholarly notions of contingencies, intangibles and strategic alignment as characterising the problematic nature of evaluation.

*Classification of intangible leadership outcomes*

The data found leadership competency frameworks were strategies to recognise emerging ambidextrous outcomes through structured models, explaining intangible behaviours by placing them in the context of a primary goal. In their seminal research into leadership coaching evaluation, Ely et al (2010) refer to the diversity of emerging leadership outcomes as the idiosyncratic nature of coaching, and a persistent source evaluation problematics. As part of a structured approach, participants were found to have identified explorative outcomes in named classifications, effectively demystifying the individuality of the leadership coaching intervention. This form of categorisation was also found to be used in participating organisations where no formal leadership competency frameworks were in place. Classifications such as trusted partner, custodian and good citizen were discussed in terms of legitimisation by participants, clarifying expectations for formal inclusion in performance management systems. The language used to describe the explorative nature of emerging leadership outcomes thematically reflect participants' awareness and creativity in designing a practical context for intangible outcomes.

The use of catch-all categorisation for explorative behaviours was reportedly intended to provide a focus for leadership coaching, and a reference point for performance management and evaluation. It was implied the development of these categories was in response to the difficulty participants had in identifying and explaining the contribution of intangible outcomes to leaders and, at the same time, an acknowledgement of their strategic value, through their contrived inclusion as criteria in reward and recognition systems. This principle was extended in some cases where participants responded to the challenge of isolating the contribution of explorative outcomes to a primary goal, through imprecise categorisation, such as 'value added', to accommodate intangibles, although this was found to be the source of inconsistent evaluation data as it was facilitated by discretionary judgements. It could be argued these categorisations exhibit the low strategic value placed by participants on evaluation, encouraging practitioners to accept imprecise metrics based on overall performance. However, they do present another opportunity to isolate coaching outcomes and provide clear and relevant metrics to produce data to inform complex decision-making as part of the organisational strategy.

*Reward and recognition systems*

Developed from an examination in literature of problematics, reward and recognition systems are seen as a source of reported participant anomalies, distracting evaluation, by being closely aligned to personal interest, thereby distorting data and a major cause of bias and inconsistency. Although participants made deliberate attempts to recognise the value of what O'Reilly and Tushman (2004) refer to as 'contingency rewards' (incentivised remuneration for a wider contribution), through classification of explorative outcomes, in practice they were perceived as too difficult to measure, and were overshadowed by performance targets against a primary goal. However, the data revealed participant awareness and found instances where reward and recognition approaches had been developed, aligned to evaluation through creative approaches to leadership remuneration. For instance, one participant reported an ambidextrous remuneration system acknowledging both exploitative targets for performance (rewarded in cash), and explorative outcomes for future development and growth (rewarded in equity). Examples of this were minimal; however, where they did exist they were a cause for optimism, reorienting reward and recognition as an opportunity (as opposed to a problematic) for further research to assist evaluation practice.

*Coaching for distinct leadership hierarchies*

The portfolio approach promoted in literature by scholars such as Lepak and Shaw (2008), to differentiate between pivotal leadership roles and provide distinct forms of coaching, is reflected in the data through the leadership hierarchies described by participants. These were designed with varying levels of discrimination, perceived as either an inclusive strategy to accommodate a large leadership cohort, or as a classification specifically focused on high potential talent, as a strategy for retention. As a promising movement, leadership hierarchies and their distinctive coaching interventions were reported by participants as being helpful to evaluation in two ways: deconstructing outcomes, and expanding the leadership perspective. In deconstructing leadership outcomes, hierarchies were found to make sense of evaluation metric in terms of different levels of expectations from distinct coaching interventions and timelines. Furthermore, hierarchies were reported to provide a wider context for leadership, uncovering multiple layers, often missed in literature, found to be highly relevant to organisations, particularly in public and third sectors. Expanding the scope of leadership in organisations was also seen as part of the reward and recognition process, and another potential destination for evaluation data as an informant.

*Demise of traditional performance reviews*

In line with current scholarly thinking, for example Capelli and Travis (2016), traditional appraisal formats and performance reviews were found to be out of favour with some respondents, presenting a movement away from reward and recognition systems as a context for evaluation. Data found participants opting for more informal frequent engagements with individual leaders, to assess performance and development needs. Responsibility for these meetings was generally shared between the leadership coaching evaluation stakeholder (for retention and development) and the individual leader (for future coach requirements). Despite this movement in some thinking around formal appraisal systems, evaluation of coaching impact was not found to be included, but presented another opportunity for system design through practice versions of what Wall et al (2017) refer to as collaborative exploration and cooperative interviews.

## Implications for practice

This final section completes the chain of research for this study. Emanating from the three broad research questions, the subject was explored through a review of existing knowledge and an analysis of new data from the participant inquiry, from which emerged corresponding high level broad areas for discussion, resulting in a number of implications for practical exploration. These implications for practice are presented as three ideas for future development, linked to the original research questions. A brief discussion around suggested tools for practice accompany these ideas.

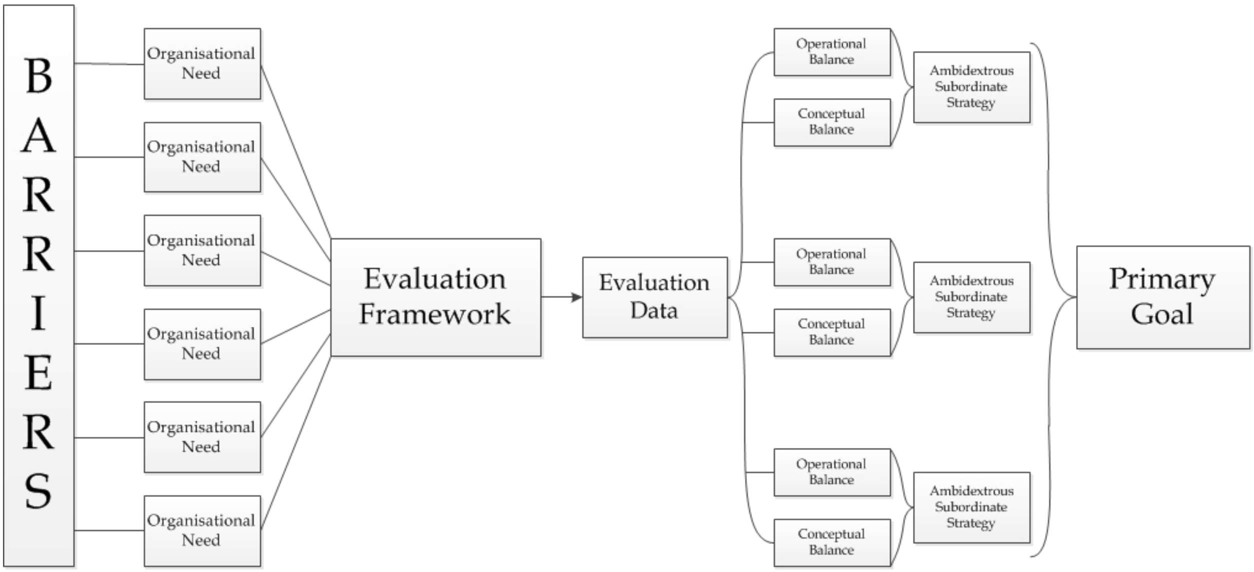
*Expand existing ambidextrous frameworks to include evaluation of leadership coaching*

This idea results from data relating to the experiences of participants of evaluation in an ambidextrous context. The research found participants made connections across the ambidextrous conceptual framework, building chains between exploitative and explorative targets as part of a subordinate strategy to achieve primary goals. These findings suggested ambidexterity was an enabling environment and an established strategic choice, closely linked to emerging leadership development goals characterised by explorative outcomes. The existing operational and conceptual leadership frameworks participants had in place were found to be representative of a new set of expectations, providing definition and structure for coaching dimensions around intangible behavioural goals. Furthermore, ambidexterity, applied to balance mechanisms, was found to successfully isolate the contributions of either exploitative or explorative outcomes by placing them in a strategic context. Furthermore, it is claimed ambidexterity has the potential to neutralise two significant and persistent barriers asserted by scholars in this field: strategic alignment and intangibles. At the same time, no participants were found to have extended these various frameworks to include evaluation. Therefore, it is suggested practitioners explore extant frameworks and systems, working with ambidexterity as an enabler for evaluation, rationalising new intangible coaching dimensions by explaining their contribution in the context of a primary goal. As an evaluation tool, it is suggested ambidextrous frameworks provide the basis of a systematic approach, while also addressing the problematic nature of evaluation, reframed in this study as the anomalous environment for practice

*Place evaluation frameworks in a strategic chain*

This second idea links to evaluation problematics and the implications of ambidexterity, in terms of the claim evaluation is limited both operationally and strategically. This claim was explored as part of a focus on the implications of data, particularly data collection and data usage. Findings around data collection addressed barriers by uncovering the evaluation system needs of participants, contributing insights and unique tools for a workable design, while data usage revealed the possible direction of evaluation to inform wider organisational strategies and raise its strategic value. In the category of data usage, two defining themes emerged: firstly, participants were found to be unambitious or not expansive in their view of the usefulness of evaluation data; secondly, the resultant quality of the data extracted from evaluation systems was found to be generally poor, focused on basic easily measurable reward and recognition targets, or future coaching programme design and maintenance. To expand the scope of evaluation data, it is suggested participants use ambidextrous balance mechanisms to connect leadership coaching dimensions directly to subordinate strategies and a primary goal. To realise the potential of the evaluation function as an informant to the wider strategy, it is suggested these are positioned in a strategic chain as part of an integrated system.

***Figure 10*****:** Where a framework for evaluation might sit in an ambidextrous chain building strategy to achieve a primary goal




The schematic shows the position of an ambidextrous evaluation framework as part of a strategic chain. Designed around the unique needs of the organisation, evaluation data is produced to inform the delivery of subordinate strategies via operational and conceptual balance mechanisms, to deliver primary goals. The suggestion that evaluation is a link in a strategic chain not only implies a wider influence for evaluation data, but, as part of a chain, an evaluation framework might act more independently of dominant stakeholders and primary goals. Furthermore, as an individual link in a chain, it has the potential to provide a simple system for practitioner use and maintenance, either as part of a collaborative process to inform wider strategy, or directly focused on a specific target.

*Design evaluation systems around a unique inventory of needs to create practical dimensions*

When questioned about the reported limitations of evaluation, respondents acknowledged the requirement for effective systems, referring to evaluation moderators as the reason for a lack of progress or motivation to invest in research and development in this area. At the same time, they welcomed the concept of an evaluation framework not limited to exploitative performance targets, with an expansive remit to inform wider organisational strategy. The third idea emanating from research implications for practice, concerns the practical dimensions of a system connecting evaluation to strategy, built around ambidexterity. It is not the purpose of this study to deliver a definitive framework for practitioners but to explore the possibilities of ambidexterity on research and development in evaluation and whether such a framework, in principle, would be helpful. This study claims strategic ambidexterity, as the basis of a model for evaluation, is enabling on three levels: to address existing barriers presented by scholars, to alleviate emerging barriers experienced by practitioners, and to impact positively on limitations. In investigating the failure of participants to expand existing ambidextrous structures to include evaluation, the research examined the moderators for evaluation, systematically investigating problem areas to uncover six new dimensions for barriers. Developed from the participant inquiry, these barriers were reoriented as corresponding practical evaluation needs: legitimisation of contradictory outcomes as part of a strategy for a primary goal; evaluation not distorted by internal reward and recognition systems; a coherent approach combining operational and strategic perspectives; consistency from evaluation practitioners; evaluation that supports succession; evaluation recognising different timelines reflecting the nature of the organisation and internal leadership hierarchies.

Informed by an inventory of needs, practitioners have the opportunity to customise the design of any evaluation system emphasising key problematics or targets so that it is relevant, workable and serves the organisational purpose. For example the dimensions of the prototype framework (***Table 9***) are deliberately uncomplicated, focused on isolating the contributions of explorative and exploitative outcomes as part of a subordinate strategy for a primary goal, upon which leadership coaching interventions can be focused. In the case of a private sector organisation focused on a primary goal for financial performance (profit), evaluation emphasis is placed on the explorative and exploitative chain link columns, reflecting the need to legitimise seemingly contradictory targets and provide data that is undistorted by internal reward and recognition systems. Similarly, where leadership development for succession is included as a key subordinate strategy, the column identifying distinct leadership coaching dimensions might be emphasised, to include specific reference to timelines, while the subordinate strategy column might be examined for strategic alignment.

***Table 9***: Example of dimensions of an ambidextrous framework for evaluation (from the private sector), where emphasis is informed by an inventory of needs

| **Inventory of needs** | **Explorative chain link** | **Exploitative chain link** | **Subordinate strategy and timeline for primary goal** | **Distinct leadership coaching dimension** | **Ambidextrous balance value proposition** |
|---|---|---|---|---|---|
| Legitimisation | **Evaluation emphasis - intangible outcomes** | | | | Unique and relevant metrics based on **Financial Performance** |
| Undistorted data | | **Evaluation emphasis - Reward & recognition** | | | Unique and relevant metrics based on |

| | | | | | |
|---|---|---|---|---|---|
| | | | | | **Financial Performance** |
| Coherent data | | | **Evaluation emphasis - strategic alignment** | | Unique and relevant metrics based on **Financial Performance** |
| Consistent judgement | | **Evaluation emphasis - Reward & recognition** | | | Unique and relevant metrics based on **Financial Performance** |
| Evaluation for succession | | | | **Evaluation emphasis - succession** | Unique and relevant metrics based on **Financial Performance** |
| Evaluation timelines | | | | **Evaluation emphasis - succession and leadership retention** | Unique and relevant metrics based on **Financial Performance** |

It is asserted the inventory of needs does not inform the ambidextrous balance value proposition, which is unique to each organisation, where evaluation metrics are adaptable to organisational drivers and performance outcomes. For instance, financial performance is likely to be evaluated in terms of profit; however, these metrics would not necessarily transfer to organisations where performance is purposive or operational, and measurements for financial accountability, social return on investment, or other KPIs, are more appropriate.

### Developing a toolkit to enrich evaluation

This study encourages practitioners to seek out appropriate systems, tools and metrics for the organisational context and work these in concert with emergent leadership coaching dimensions. Authors such as Wall et al (2017), providing a collaborative research approach including leadership coaching and scholarly perspectives, highlight a diverse range of evaluation tools, significantly emphasising enrichment over complication of practice. This study also supports the assertion from these authors that the strategic transition of evaluation conceptually moves it from operational advocacy to a provocative function, providing valuable insights and informing wider strategy. Accordingly, toolkits might be expected to reflect both the significant influence of the unique organisational context and the wider strategic role, as a catalyst for creativity and innovation, aligned to new ambidextrous leadership outcomes. The following table suggests some areas for the development of tools, encompassing the three themes discussed in this chapter:

***Table 10*****:** Suggested areas for development of enriching evaluation toolkit

| **Practice implications** | **Suggested areas for development of enriching evaluation toolkit** |
|---|---|
| Expanding ambidextrous frameworks to include evaluation | Data usage tools connecting evaluation to strategy |

| | |
|---|---|
| | Data collection tools connecting evaluation to the unique organisational context |
| Evaluation as part of a strategic chain | Tools that integrate evaluation into the wider strategy: Conceptual frameworks that provide clear pathways to strategic goals |
| Inventory of needs | Clear alignment for reward and recognition systems to organisational culture and values |
| | Creative compensation systems that simultaneously recognise short and long term performance |
| | Clear leadership pathways |
| | Tools for collaborative exploration: dismantling traditional appraisal structures through co-operative interviews |

# Chapter 6 - Conclusion and reflections for practice

This study presents an organisational perspective for practitioners, invigorated by a lens of ambidexterity. Initially, ambidexterity was adopted as a strategic lens for research to provide a practice environment in which to study evaluation and close the gap between theory and implementation. It was assumed at the outset that ambidexterity represented the complexity of the emerging context, exacerbating existing problematics and limitations; however, as research developed, it was found participants experienced ambidexterity as an expansive opportunity rather than a limiter. In practice, organisations used ambidextrous balance propositions as a basis upon which to build chains, connecting exploitative and explorative outcomes across various conceptual frameworks, for creative and innovative subordinate strategies to achieve a primary goal. Furthermore, ambidexterity proved to be a familiar concept with participants, facilitating a rich source of data, illuminating both problematics and promising movements in evaluation, by providing the researcher with a platform to explore, and be curious about, the anomalies and contradictions that have so far characterised research in this field. From this approach, new insights into barriers were produced, with problem areas being investigated at source and the influencers for evaluation being highlighted. This produced four evaluation moderators, from which six barriers emerged, refreshing previously oversimplified definitions, where it was evident that the source of evaluation problematics was not the systems or processes available to practitioners, but the internal organisational contexts and cultures within which evaluation was practiced.

It was felt that a detailed understanding of barriers, placed in the context of participants' evaluation needs, would effectively inform the possible components of a new evaluation framework. Participants' familiarity with the ambidexterity also produced an understanding of evaluation data usage, and what would be useful for practitioners and their organisations. Therefore, the approach of this study was to gain an understanding of what evaluation practitioners needed, to elicit knowledge about barriers and future system design, and what they wanted from resultant data, to expand the potential scope for evaluation. It is hoped that a system, found to be both workable and strategically helpful, might encourage practitioners to raise the strategic value placed upon evaluation to invest in future research and development. This study does not claim to have revolutionised thinking in this area, but reimagined evaluation practice through a lens of ambidexterity. The seven promising movements reflect existing practice from an ambidextrous perspective, supporting the claim in this study that, although ambidexterity is a complex and layered operating environment, it has the potential to enable, rather than hinder, evaluation.

Despite the organisational perspective for this research, findings have raised interesting areas of personal reflection on my own leadership coaching consultancy. This study's contributions in terms of moderators, problematics and implications for practice, has had a significant effect on the direction of my practice both operationally and conceptually. In operational terms, three main areas have emerged: key relationships; the coach's role as an arbiter of evaluation; and the coach's assistance in the design of evaluation frameworks. Findings around moderators provoked a re-examination of the tripartite relationship between coach, coachee and sponsor. The implication of moderators, providing a deeper understanding of leadership outcomes and evaluation problematics, is that the coach has a potentially pivotal role in the organisation, as a quasi consultant to the wider strategy, facilitated by strategical aligned evaluation data. At the same time, data from the participant inquiry suggests that an expansive role for the coach would be controversial and, in some cases unwelcome. Therefore, it is incumbent on the coach to seek out collaborative relationships with key stakeholders, to be able to make use of moderators, providing valuable insights into the unique organisational structure, delivering strategically aligned coaching, integrating evaluation. In placing high strategic value on the relationship between coach and client, collaboration extends beyond agreed outcomes to include disambiguation of multiple definitions and priorities for evaluation targets (a source of bias and contradiction), and effective dissemination of relevant strategically aligned data. Using moderators to clarify coaching dimensions and critical evaluation data will also enable distinct development programmes across a leadership hierarchy, with corresponding evaluation criteria to inform career progress and leadership talent capacity.

Evaluation problematics, redefined by ambidexterity and emergent moderators, reveal the influence of internal structures, philosophies, cultures and values, over external forces and complex irrelevant formal methodologies, as problematic for evaluation. As part of the reimagined relationship, facilitated by moderators, the coach has the potential to disseminate insights from evaluation data as an external neutral arbiter. This would effectively be an opportunity to negate bias and contradiction, departmental silos and inconsistent judgements arising from succession strategies and HR perspectives that are not strategically aligned. Finally, the implications from redefined barriers and emergent promising movements, provides a further opportunity for coaches to develop and extend their offering to, not only provide evaluation data that informs the wider strategy, but assist in the design of systems that connect strategy to evaluation. Tools that address practice implications would be developed through the coach-client relationship, to practically collaborate in the design (or extension) of ambidextrous frameworks, positioned as an independent component of an integral system, using moderators to provide an inventory of unique organisational needs. In practical terms, the challenge to develop key relationships, uninvited by stakeholders and unfamiliar to the coaching contract, should not be underestimated.

Moderators provide a level of insight that suggests the coach is qualified to make a wider contribution, and evaluation is presented as the facilitator of rich strategic data; however data suggests stakeholders are often reluctant to countenance external input. This raises a wider conceptual question with far reaching implications for the coaching industry, within which my own consultancy must make decisions on future direction, specifically: if a collaborative relationship is unachievable, does this compromise the coaching offering, and at what stage should the coach reject a contract? It is acknowledged coaching is a business, and ambidextrous tensions between short term financial gain and long term professional integrity apply in a similar way to the organisational conflicts described in this study. Without access to the unique organisational context, the coaching intervention is liable to be restricted or limited, and at risk of disappointing all members of the tripartite relationship. This study claims evaluation provides advocacy and the tools for a strong collaborative relationship and, in doing so, asks questions of both coach and client, who choose to ignore its potential wider strategic contribution.

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# Appendix

## Examples of diverse definitions of ambidexterity from participants

| Interpretation of ambidexterity | Primary goals | Primary goal stakeholder |
|---|---|---|
| "You have to adjust to short term circumstances, but in doing that, you have to be working towards a long term goal." | Investment bank: Financial performance (for profit) | Shareholders |
| "Outcomes shift in line with business strategy…when the company is at high capacity leadership outcomes veer towards intangible behaviours; at lower capacity, outcomes are more focused on financial performance and delivery of short term targets." | Mergers and Acquisitions: Financial performance (for profit) | Directors as shareholders |
| "Some equity partners are focused entirely on short term financial performance and others are interested in long term development and cultural growth of the business. We accept the two because you need a balance." | Surveying practice partnership: Financial performance (for profit) | Equity partners |

| | | |
|---|---|---|
| **"Strategic balance is informal. The charity is tasked (sponsored) to deliver quantifiable government targets which it informally pursues through leadership development, which, as the domain experts, we know will deliver long term results."** | **Education charity: Performance for purpose: "To equalise education through impact in the classroom."<br>Financial performance (for government targets)** | **Multiple stakeholders** |
| **"The impact of incidents and the need to respond to a change of direction in a highly focused leadership environment."** | **Public sector organisation: Operational performance** | **Public** |
| **"To create the space and capacity for longer term thinking you have to work very hard on the short term focus. You have to deliberately carve the time out otherwise you will be consumed, not only by today but also the past."** | **High performance public sector organisation: Operational performance** | **Public** |
| **"You have to be creative and innovative in your thinking, to find different ways to get to the outcomes you want."** | **Homelessness charity: Performance for purpose** | **Society** |